



Duty Statement

Classification: **Supervisor I**

Position Number: **275-920-4800-007**

HCM#: **4197**

Branch/Section: **Customer Education & Outreach Division / Regional Offices / Sacramento Regional Office**

Location: **Sacramento, CA**

Working Title: **Regional Office Manager**

Effective Date: **September 1, 2026**

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

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

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

The Customer Education & Outreach Division (CEOD) serves as the first point of contact for CalPERS employers, as well as active and retired members, offering guidance on program benefits and services. Responsibilities include educating employers and members, conducting instructor-led classes, addressing specialized education needs, managing communication functions, and creating educational materials. Additionally, CEOD oversees internal training programs for both new and existing CalPERS customer service representatives.

The CEOD Regional Offices are responsible for providing in person and virtual assistance to active and retired members by conducting presentations, and meeting with customers on an individual basis regarding retirement and health benefits and applying the Public Employee Retirement Law (PERL), the Public Employee's Medical and Hospital Care Act (PEMHCA) and new legislation and policy initiatives in answering customer inquiries.

Under the general direction of the Supervisor II of the Regional Office, and working with division team leaders, the Supervisor I supports the goals and objectives of the CalPERS CEOD and is responsible for the team leaders and operation activities of the Sacramento Regional Office. This regional office serves active members, retired members, public agency employers, county school districts and all State agencies within the assigned geographical area and virtually throughout the state. Specific responsibilities include:

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.

- 45% Onsite¹ and virtually, plans, organizes, and directs the overall team leaders and operation activities of a team of team members in the Regional Office responsible for providing assistance and education to members, beneficiaries, employers and the general public on retirement and health benefits. Establishes work assignments, make recommendations, implement policies, and provide training and direction for unit team members regarding the interpretation of rules, laws and regulations. Incorporate new program assignments into office operations by developing procedures or methods, assigning individual work responsibilities to employee supervised, establishing goals and objectives, and developing expectations for work evaluation. Reorganizes job responsibilities/assignments as needed.
- Onsite and virtually, monitors, evaluates, and completes employee performance appraisals. Evaluates work performed in the office, virtually, and in the field and identify team members training needs and/or training opportunities for improved job performance. Provides feedback and recognition to unit team members. Promptly identify and addresses/resolves employee performance issues. Recruit and hires team members. Develop work schedules. Maintains attendance reports. Conducts regular team member meetings. Ensures compliance with Bargaining Unit agreements, hiring practices, CalPERS and CEOD policies and procedures.
- 25% Onsite and virtually, leads special project teams assigned to the Regional Office. Attends scheduled team leader meetings. Exemplifies an understanding of the goals and objectives of the Division. Assists in the development of the annual budget and obtains all necessary personnel, office space, equipment, lease vehicles and supplies to carry out the mission of the regional office.
- 15% Onsite and virtually, represents CalPERS at meetings with employer and employee groups, make presentations, provide information, interprets policy, answer questions, resolve problems by providing specific answers on high level complex issues for all major programs administered by CalPERS which includes Retirement, Health Benefits, Long Term Care, Deferred Compensation, and the Member Home Loan Program.
- Onsite and virtually, develops and provides necessary background materials and resources, handle or follow through for team members on matters of extreme sensitivity, complexity or potential adverse situations to the retirement system.
- 10% Onsite and virtually, represents CalPERS at meetings with government officials or governing bodies, such as City Managers, Finance Directors, City Councils or other governing bodies to interpret retirement and health benefit policies, laws, rules and regulations; to provide information or guidance on all matters affecting the retirement system.
- 5% Onsite and virtually, other duties as assigned and appropriate for this classification.

Working Conditions

- ¹ This position is designated as office-centered and works primarily on-site at the Sacramento, CA Regional Office at least three workdays.
- Office Coverage is required from 8:00 AM to 5:00 PM.
- Approximately 10% to 25% of the time may be spent at field locations conducting or overseeing retirement planning presentations, attending offsite training classes, inclusion activities, special project team meetings, and providing office coverage for other regional offices.
- Multi-night travel may be required as well as working after normal working hours and weekends.

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:**