Duty Statement

Classification: **Supervisor I**

Position Number: **275-440-4800-019**

HCM#: **2001**

Branch/Section: **Disability & Survivor Benefits Division / Survivor Benefits Section / Post Retirement Survivor Benefit**

Location: **Sacramento, CA**

Working Title: **Survivor Benefit Team Leader**

Effective Date: **October 15, 2026**

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

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

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

The Disability & Survivor Benefits Division (DSBD) provides benefits and information to members, retirees, beneficiaries, and survivors. The Post-Retirement Survivor Benefits Section is a high-volume production unit that pays post-retirement survivor benefits, and researches and resolves the most complex survivor benefit cases.

Under the general direction of the Post Retirement Survivor Benefit Supervisor II, the Supervisor I serves as the first line working team leader for team members responsible for survivor benefit determinations, beneficiary eligibility reviews, adjustments, and survivor status changes, and personally addresses the most difficult benefit issues. The position also coordinates implementation of legislative and procedural changes, maintains internal controls, and provides unit input on automation changes affecting survivor benefit operations.

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% Onsite[1] and virtually, assign, prioritize, and review the unit's workload for survivor benefit determinations, beneficiary eligibility, analysis and application of laws and policies governing the payment of various types of death benefits, adjustments, and survivor eligibility status changes. Adjust work priorities and redistribute assignments in response to workload fluctuations to support section service level goals. Identify workflow issues, develop process-improvement recommendations for leadership review, and recognize team member

contributions to support team member engagement. Review internal controls to ensure appropriate determination of benefits and reliability of management records.

30% Onsite and virtually, assign weekly workload to team members and monitor case status using myCalPERS, Microsoft 365 Applications, and internal programs to support service level goals. Work closely with unit team leaders to communicate process changes and updates to team members. Identify and develop improved or streamlined workload processing methods. Identify training needs of unit and coordinate with the training team leader to provide the initial and refresher training of team members as required. Conduct one-on-one coaching sessions to provide performance feedback, identify developmental strengths and needs, and discuss growth goals. Facilitate meetings by organizing regular unit and section meetings, as well as conducting one-on-one sessions to support team members and track progress.

20% Onsite and virtually, review the most sensitive, complex, and extraordinary benefit problems and personally resolve or delegate them for resolution. Identify and onboard additional team members, as needed, to provide specific technical expertise on various phases of the project. Ensure team members are briefed on their role and are given the information needed to frame their input.

Onsite and virtually, direct the design of procedures and provide instructions to the training unit involving entitlement to benefits, including policies and procedures for the analysis of pending legislation and the implementation of chaptered legislation. Coordinate the development of written guidelines on policy and procedural changes. Maintain consistency with improvements gained through benefit process re-engineering and improving accountability of death benefits processing.

5% Onsite and virtually, assign, review, and approve executive correspondence for division chief or executive team leader signature in response to escalated customer inquiries. May testify at committee meetings or hearings before the Legislature as well as present to employer groups or other interested stakeholders. Ensure legislative changes are implemented timely and completely, and that benefits are being paid in accordance with all applicable law and policies.

Onsite and virtually, represent the Post-Retirement Survivor Benefit unit at meetings and planning sessions on automation projects. Provide input and recommendations to senior leadership on proposed system modifications. Assess the changes identified in the plan and provide input and recommendations on behalf of the Post-Retirement Survivor Benefit unit regarding proposed modifications and elimination of control features. Perform other duties as assigned 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 represents the duties of the position.

Supervisor Signature:_____ **Date**: