Duty Statement

Classification: **Supervisor II**

Position Number: **275-220-4801-002**

HCM#: **4779**

Branch/Section: **Financial Office / Financial Planning, Policy & Budgeting Division / Administrative Budget & Financial Planning**

Location: **Sacramento, CA**

Working Title: **Program Budget Manager**

Effective Date: **November 9, 2026**

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

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

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

As a part of the CalPERS Financial Office (FINO), Financial Planning, Policy & Budgeting (FPPB) provides control and direction for budgeting, policies, and forecasting. The division coordinates the funding for the administration of all CalPERS' programs, conducts highly complex and sensitive financial accounting and analysis, pension and investment accounting, and financial system configuration, management, and support activities to assist CalPERS in improving operational efficiency and effectiveness.

Under the general direction of the Assistant Division Chief, the Supervisor II is responsible for managing the day-to-day operations of the CalPERS Budgets & Financial Planning Section. The Supervisor II provides oversight of units performing complex analysis in a wide variety of budget and fiscal activities. Team members work independently in highly visible, sometimes confidential areas and will require coordination and cooperation with other divisions, control agencies, and vendors.

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% Onsite[1] and virtually, plans, organizes, and directs the activities related to the CalPERS Budget Management program by establishing priorities, assigning work, and monitoring budget development, expenditure tracking, and forecasting activities to produce accurate

financial plans and reports. Consults with and advises senior and executive leadership on budget issues by presenting budget analysis, fiscal risks, and funding recommendations developed by section analysts. Directs and reviews team member analysis of budget and financial accounting implications of legislation, initiatives, and Board decisions, and provides recommendations to the Manager II. Oversees the development and implementation of budget-related procedures and program processes, ensuring alignment with established policies and compliance with legal, regulatory, and control agency requirements.

30% Onsite and virtually, plans, organizes, and directs the overall operations of the Budget Section through subordinate supervisors and team members, ensuring section activities are coordinated and aligned with division objectives. Establishes overall goals and objectives and directs supervisory team members in executing the section's workload. Creates and manages teams to develop, recommend, communicate, and implement improvements in approved budgetary and fiscal policies and procedures. Directs team member development by assigning work, providing training, and evaluating performance to improve productivity and quality of work. Establishes the unit's work plans to ensure goals and objectives are being fulfilled and report these results to division leadership. Provides oversight to team members responsible for supplying program information to the Department of Finance and Legislative Analyst's Office.

30% Onsite and virtually, manages work associated with the development and implementation of the annual business plan and budget process. Ensures budget development and resource allocation activities support CalPERS Strategic Plan goals through direction and oversight of section operations. The Supervisor II, individually or through delegation to team members and supervisors, represents the Division in meetings regarding new program initiatives and directs the resolution of complex fiscal issues confronting CalPERS. Develops or oversees the development of performance improvement plans as necessary. Develops and implements plans to hire, train, develop, and evaluate team members to maintain required analytical and technical expertise for section operations. When appropriate, recognizes outstanding performance. Ensures that production standards of quantity and quality are met by delegating authority to supervisory team members to assign work, monitor performance, and maintain quality and timeliness of outputs. Requests training and development opportunities for fund and retirement program accounting team members. 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.

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**: