# Duty Statement

Classification: **Supervisor I**

Position Number: **275-143-4800-001**

HCM#: **3199** **JC-540664**

Branch/Section: **Strategy, Projects & Data Analytics Division / Enterprise Project Services / Project Support & Innovation**

Location: **Sacramento, CA**

Working Title: **Project Support and Innovation Team Leader**

Effective Date: **October 15, 2026**

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

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

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

The Strategy, Projects & Data Analytics Division (SPDA) supports CalPERS in achieving enterprise goals by guiding enterprise planning and performance; leading organizational development, change management, and strategic projects; and conducting research and data analytics to inform policy issues, business decisions, and process improvements.

Under the general direction of the Supervisor II, the Supervisor I serves as the working supervisor for the Project Support & Innovation team. The incumbent supervises and develops assigned analytical team members, personally performs the team's most difficult or sensitive project management, change management, and organizational development assignments, and oversees the ongoing administration of the CalPERS Idea Factory program. The incumbent directs day-to-day work within the team, reviews deliverables, resolves assignment-level issues, and recommends improvements to project delivery and program administration.

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## 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, plan, organize, direct, and evaluate the work of analytical team members assigned to Project Support & Innovation. Establish workload priorities consistent with EPS direction, assign and monitor work, and balance assignments based on operational needs, project deadlines, and team member readiness. Review project charters, schedules, work plans, stakeholder analyses, communication plans, status reports, and other deliverables for accuracy, completeness, and alignment with approved requirements. Provide direction on

difficult or sensitive assignments, monitor progress, and resolve or elevate issues affecting timely completion.

Onsite and virtually, administer performance management processes by communicating expectations, providing timely feedback and coaching, documenting follow-up actions, addressing performance or conduct concerns in consultation with the EPS Supervisor II and Human Resources, and recognizing team member accomplishments. Prepare, conduct, and document probationary and annual performance evaluations, as applicable. Identify individual development needs, provide or arrange training, and review recommended approaches and solutions to strengthen independent research, analysis, and project delivery skills. Participate in recruitment and selection activities for assigned positions.

30% Onsite and virtually, lead assigned projects and supervise team members performing project management, change management, and organizational development engagements, including the development of project charters, schedules, work plans, stakeholder plans, and status reports. Direct team member analysis of business partner needs and review recommended project approaches based on approved methodologies and documented project requirements. Participate in, or lead, Board of Administration (Board), executive, and senior leadership projects by clarifying expectations, accurately scoping and scheduling projects, and determining optimal approaches including relevant research methods.

Onsite and virtually, direct and review the preparation of project plans, stakeholder analyses, communication plans, risk logs, and implementation plans using project management and change management methodologies. Review, refine, and approve defined deliverables within delegated authority for accuracy and completeness. Develop and monitor project plans. Coordinate with leadership, sponsors, affected State organizations, contractors, and other participants to document project commitments, decisions, and unresolved issues to support stakeholder alignment.

Onsite and virtually, identify, analyze, document, and track project risks and issues; develop mitigation options and resolution recommendations for sponsor, stakeholder, or SPDA leadership review. Conduct risk assessments at established milestones and draft and maintain risk and issue reports providing concise, accurate, and actionable information to sponsors, stakeholders, and SPDA leadership. Facilitate project team meetings, document decisions and action items, coordinate stakeholder input, and track follow-up items. Assist in analyzing project and change management considerations to recommend effective communication and delivery approaches to project sponsors, executive sponsors, and team leaders regarding project updates, announcements, timelines, and other key information, while identifying and addressing risks such as resistance to change, unintended impacts, and less effective solutions. Personally perform the most difficult or sensitive assignments and provide guidance to team members on resolving complex project issues.

25% Onsite and virtually, provide oversight of the CalPERS Idea Factory Program. Direct and review team member work involving the review and prioritization of idea submissions; coordination with internal business owners, leadership, and stakeholders to assign actions and monitor timelines; facilitation of Senior Leadership Council idea vetting, voting, and discussions; preparation of program communications, reports, and presentations for executive leadership and the Board; maintenance of program web pages, policies, procedures, and document libraries; tracking of risks, issues, and deliverables; and evaluation of program metrics, feedback, and innovation best practices to recommend program improvements.

Onsite and virtually, review team member analyses and recommendations, provide direction on sensitive or non-routine submissions, and personally address program issues requiring supervisory involvement. Attend CalPERS and division leadership meetings to report program progress and escalate issues and risks as needed. Draft and review proposed updates to

project management policies, processes, and procedures, and submit recommendations to SPDA leadership for review and approval.

5% Onsite and virtually, 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**: