



**State of Oregon
Public Employees Retirement System
Position Description**

Position Information

Employee Name: Vacant

Position No:

Class Title: Project Manager 2

Class No: C0855

Working Title: Project Manager

Agency No: 45900

Section Title: Strategic & Operational
Planning (SOP)

Budget Auth. No: 000232950

Rep. Code: OA

Established Date: 7/1/1990

Work Location: Headquarters - Tigard
OR

PD Revised Date: 5/16/2016

Position: Permanent / Full-Time

FLSA Classification: Non-Exempt

Eligible for Overtime: Yes

PERS Mission Statement

We serve the people of Oregon by administering public employee benefit trusts to pay the right person, the right benefit, at the right time.

Program Information

Describe the program in which this position exists.

Policy, Planning and Communications Division (PPCD) / Strategic and Operational Planning (SOP)

The Policy, Planning and Communications Division (PPCD) consolidates & coordinates the inter-related supporting processes of Communication, Compliance and Risk, and Strategic and Operational Planning. Processes within this division provide the principle drivers for improvements in the agency's key goals and performance measures. Enterprise-level strategies, objectives and priorities are executed through the disciplines managed by this division, working across the entire agency to ensure business processes & functions progress toward fulfilling the agency's mission, vision and core values and operating principles.

Strategic and Operational Planning Section

The SOP is a section within (PPCD) charged with increasing agency effectiveness, process improvement & improving overall organizational capability development to

provide visibility and fostering success of agency strategic plan. SOP provides PERS with leadership of the agency's strategic planning function, organizational capability services & project management expertise. SOP utilizes standardized methodology to identify cultural, structural, programmatic & project related changes. Organizational Capability addresses agency beliefs, attitudes, values, culture & structure to improve service to members, adapt to new technologies & proactively meet the challenges of today & tomorrow. SOP follows agency vision & objectives as directed by PERS executives. Facilitates planning, initiation & prioritization of PERS projects/initiatives. Provides support for agency strategic & tactical planning. Partner with senior leadership & others to develop, implement & maintain agency's strategic plan & ensure budget is available for executing plan. Facilitate strategic initiatives to ensure consistency & alignment of agency systems & processes. Facilitate cultural change initiatives ensuring alignment with agency's mission, shared vision, key operating principles & core values.

Position Purpose

Describe the primary purpose of this position.

PM2 Project Manager

Leads the planning and administration of medium to large agency-wide enterprise projects which could involve IT projects sponsored by Executive-level staff within PERS. Elements include directing, coordinating and controlling the associated activities for both technical and end user staffing assigned to the project; controlling project scope, cost and delivery schedules; developing detailed project plans; and managing the execution of these work plans. The technical complexities of these project are exacerbated by the complex nature of PERS retirement options.

0 %

Plans and directs multifaceted complex projects that carry significant risk and financial impact. They generally manage multiple projects that are cross functional, generally addressing two or more operating divisions of the agency. This also includes working directly with other state agencies as well as with Employers who employ members of the OPERS systems, out of State contractors and vendors. Executives within the agency sponsor all of the projects assigned to this position, and the incumbent has additional reporting responsibilities to the OPERS Project Steering Committee and the ISD Administrator within the agency.

Core Competencies

Title and Definition

Weight

Teamwork and Collaboration

25 %

Is an effective team player who adds complementary skills and contributes valuable ideas, opinions, and feedback to the team.

Simplicity

25 %

Reducing barriers through clear communication and streamlined processes.

Innovation	25 %
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Empowering change through collaborative teamwork.

Integrity	25 %
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Inspiring trust through transparency and accountability.

Description of Duties

Title and Definition	% of Time
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E - Project Execution, Control, and Closure

- Lead and direct the activities of project teams to make certain projects progress on schedule and within prescribed budget.
- Monitor progress of work assignments against the project schedule and revise project schedules as necessary and required by the Executive Sponsor.
- Analyze and prepare budget reports to calculate and track project expenses and identify excessive expenditures. Examine costs or expenditures and compare to original budget, and then resolve any potential cost over with key stakeholders, including other project team members and the Executive Sponsor.
- Exercise effective project change control for any changes to project scope, schedule and cost. 40 %
- Formally manage issues and risks throughout the project, which includes both mitigation and contingency planning.
- Manage vendor contracts, work orders, and amendments which includes monitoring and approving contractor performance.
- Evaluate project performance and deliverables to make certain project results meet the intended goal and objectives as specified in the Business Case, Project Proposal and System Requirements. This includes meeting or exceeding stakeholder expectations and OPERS quality standards.
- Perform quality control oversight which includes quality checkpoints and quality gates.

E - Project Initiation and Planning

- Facilitate meetings with executive sponsors, staff and project stakeholders on project status, timelines and deliverables.
- Initiate projects by obtaining authorization and commitment, demonstrating business need, project feasibility, budget and spending plans.
- Assist with development of Business Cases & Project Proposals submitted to the Executives for approval and prioritization.
- Coordinate and lead the identification, prioritization, and scheduling of maintenance and enhancement (M&E) projects for agency enterprise systems.
- Develop and manage master project plans that coordinate individual work tasks, schedules and preliminary project budgets.
- Select and use project management tools and techniques to accomplish the project goals and objectives.
- Develop Project Proposals, Statement of Work (SOW) and Project Plans for all project sizes, including major initiatives.
- Collaborate with stakeholders and follow contracting guidelines to develop contractor statement of work, obtain bids from contractors as required and 40 %

make vendor recommendations based upon collaboratively developed decision criteria.

- Identify project team members in conjunction with both IT and business management.
- Develop network diagram, project schedule, and cost estimates.
- Identify potential risks and difficulties, and design strategies to mitigate or avoid them.
- Prepare project budgets and track budget expenditures that summarize total expected costs.
- Create documentation procedures to capture and deal with changes in original project plan.
- Lead project teams to produce Work Breakdown Structures (WBS) that outline the individual project plans; assign duties, responsibilities and scope of authority to project team members.
- Prepare projects for quality control oversight which includes quality checkpoints and quality gates.

E - Project Communication

- Prepares written documentation and makes oral presentations on various aspects of assigned projects to the Senior and Executive Management as well as the Project Steering Committee. Project documentation and presentations are frequently required at other state agencies, particularly Department of Administrative Services (DAS).
- Coach all project team members on the tenets of effective project management as specified in the Project Management Body of Knowledge (PMBOK) from the Project Management Institute (PMI).
- Lead and resolve conflicts between project team members, regardless whether they are technical, business or inter-personal problems.
- Coordinate project activities with other State agencies, other governmental stakeholders and private sector partners as required.
- Develop project status reports and maintain project master files documenting progress throughout the course of the project, which includes preparing the final project archive file at closure of project.
- Promote a collaborative environment on projects and function as a liaison between the business divisions and the IT organization and contracts.

20 %

Physical Requirements - Working Conditions

Describe any on-going working conditions. Include any physical, sensory and environmental demands. State the frequency of exposure to these conditions.

Standard office equipment/supplies. Regular and timely attendance is an essential function required to meet the demands of this job and to provide necessary services.

PM2 Project Manager

Subject to pressure due to priority work or high volume of work. Air-conditioned office. Smoke-free environment. Travel may be required in this position.

0 %

Guidelines

List any established guidelines used in the position, such as state or federal laws or regulations, policies, manuals or desk procedures.

Project Management Institute’s (PMI) Project Management Body of Knowledge (PMBOK)
 COTS Software and Hardware Manuals
 Agency Project Management Procedures
 PERS Policies and Procedures
 ISD SDLC (Software Development Life Cycle)

How are these guidelines used to perform the job?

They provide general guidance and policy directions, and framework to the incumbent who must interpret and apply them as necessary for each application. Position may recommend revisions to the above guidelines, including justification and need for the revision. Guidelines are used to provide general and specific guidance for the administration and development of rules and policies, establish the basis and criteria for required standards, and to provide interpretation of laws and regulations.

Work Contacts

With whom, outside of co-workers in this work unit, must this position regularly come in contact?

Who	How	Purpose	How Often
Private sector firms for actuarial & pension plan information, (such as MERCER & ING).	Verbal, Written & Electronic Media	Provide plan participant information for rate calculations & OPSRP fund management	weekly
Auditors from PERS, Secretary of State and private sector auditing firms	Verbal & Written	Auditing of all aspects of project management	quarterly
Contracting staff & management both internal & external to the agency	Verbal & Written	Contract development & management, including work orders	weekly
Application software vendor(s)	Verbal & Written	Integration & alignment on all aspects of project management	daily
Agency Executives functioning as project sponsors	Verbal & Written	Project Management including issue, risk & change management	2 to 3 times each week

Position Related Decision Making

Describe the typical decisions of this position. Explain the direct effect of these decisions.

PM2 Project Manager

This position provides leadership for agency-wide coordination of project management efforts by establishing solid working relationships with agency executive staff, senior level management, and information technology resource management personnel. This position makes decisions regarding project scope, project feasibility, project timelines, project staffing, outsourcing, software development, design and technical service delivery, and system architecture.

This position has planning and delivery responsibilities for an extremely complicated three tiered retirement system, which is the third most complex retirement system in its peer group. The projects at PERS address the needs of approximately 870 employers and 95% of all public employees in Oregon, including all state agencies, universities and community colleges as well as all school districts and most cities, counties and other local governmental units. The PERS fund is valued at more than \$56 billion and is the 22nd largest public or private pension fund in the United States. There are two major computer systems that support the PERS fund, with the first being our legacy system, RIMS, and the second being our new and more technologically advanced system, jClarety. The Project Manager leads all projects associated with these systems which directly impact more than 212,000 active members and 103,000 retirees.

0 %

Review of Work

Who reviews the work of the position?

Mgr Classification	How	How Often	Purpose
X7008	regular status reports	weekly	To ensure that projects are being executed according to agency needs and requirements.

Additional Position-Related Information

ADDITIONAL REQUIREMENTS: List any knowledge and skills needed at time of hire that are not already required in the classification specification:

This position is critical to the short and long term success of OPERS' project management and requires demonstrated project management skills. The incumbent must have demonstrated leadership skills and be able to communicate well with technical and non-technical members of a diverse project team. The position requires sensitivity to and ability to work effectively in a political environment. Experience facilitating and negotiating workable solutions with people who have diverse perspectives is essential.

The Project Manager has frequent contact with all levels of the agency’s staff, contractors and consultants. This includes communications in person, in writing, by telephone or electronic mail to gather and exchange information, discuss regulations, explain project activities, solve problems, redefine project scope, and coordinate project activities. This requires contact with other State agencies and occasionally with other governmental entities participating in the OPERS. The employee may also interact with OPERS members and other project stakeholders and members to explain project activities, resolve complaints and bring about agreement on project direction and outcomes. The employee frequently contacts all levels within the business to gain agreement and maintain commitments regarding project requirements. They lead and collaborate with other internal work units to achieve project results.

SPECIAL REQUIREMENTS: List any special mandatory recruiting requirements for this position:

Employees will be subject to a computerized criminal history background investigation. Adverse background data may be grounds for immediate disqualification.

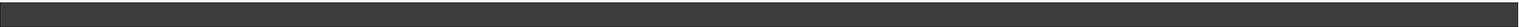
Preference may be given to those applicants who have Project Management Professional certification by the Project Management Institute and/or State of Oregon Project Management certificate or equivalent experience.

BUDGET AUTHORITY: If this position has authority to commit agency operating money, indicate the following:

Physical Demands - General Activities

- (N)ot Required - 0%
- (I)ntermittent - 1 - 5%
- (O)ccasional - 6 - 33%
- (F)requently - 34 - 66%
- (C)ontinuous - 67 - 100%

- Lifting <10 lbs
- Lifting >11-25 lbs
- Lifting >26-50 lbs
- Lifting >50 lbs



	% of Time	Notes
Sitting	C	Desk/Office
Standing	N	
Walking	O	Carpet/short distances
Climbing/Balancing	N	
Reaching - with arms and hands	O	
Stooping/Kneeling/Crouching/Crawling	N	

Talking	O	
Hearing	C	
Lifting	I	<10 lbs. files/paper
Vision - close, peripheral, depth, ability to adjust focus	C	

Organizational Chart

To view a copy of a current organizational chart, click [here](#).

Employee Statement of Understanding

I have read and understand the position description for my position. I am able to perform all of the essential functions of this position.

I agree to comply with the agency's compliance policies and all laws, rules, regulations and standards of conduct relating to my position. As an employee, I understand my duty to report any suspected violations of the law or the standards of conduct to my immediate supervisor.

As an employee, I will strive to uphold the mission and vision of the organization. All employees are required to adhere to the values in all their interactions with citizens and fellow employees.