



Duty Statement

Classification: **Analyst II**

Position Number: **275-091-5393-003**

HCM#: **1851**

Branch/Section: **Investment Office / Sustainable Investments**

Location: **Sacramento, CA**

Working Title: **Sustainability Advocacy & Partnerships Analyst**

Effective Date: **May 1, 2026**

Collective Bargaining Identifier (CBID): **R01**

Supervision Exercised: Yes No

Telework: Office-Centered Remote-Centered Not Eligible

CalPERS is the nation's largest public pension fund with investments in both domestic and international markets. The Investment Office (INVO) invests and manages CalPERS assets in an efficient and sustainable manner to generate risk-adjusted returns that meet CalPERS funding obligations. The portfolio invests in public equity, public fixed income, real estate, infrastructure, private equity, private debt and other opportunistic public and private assets. The Sustainable Investing (SI) program is responsible for: advising CalPERS Board on governance and strategy, thought leadership which drive results from CalPERS sustainability strategic planning, coordination of CalPERS Emerging Manager Program, advocacy, and public communication for the Investment Office.

Under the direction of the Managing Investment Director (MID), the Analyst II works closely with the SI Team, other Investment Office staff, and high-level representatives to complete a variety of complex analytical duties. The incumbent acts as the assistant to the MID and provides support to the overall SI team while adhering to time sensitive deadlines, exercising a high degree of discretion, initiative, and integrity. The Analyst II will maintain a positive team approach while demonstrating CalPERS' Core Values of Quality, Respect, Integrity, Openness, Accountability, and Balance in accordance with personal work ethic in alignment with CalPERS Investment Beliefs.

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. 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% Onsite¹ and virtually, lead, support and assist the MID with administrative duties including, but not limited to, scheduling meeting requests, maintaining calendars, making copies of sensitive

and confidential documents and assisting in relieving the MID of less complex tasks, as appropriate. Independently draft, edit and assemble various documents to ensure accuracy, utilize a variety of PC functions, styles and formats per CalPERS standards. Respond to inquiries orally and/or in writing from various stakeholders and consultant groups, while maintain confidentiality.

Initiate and prepare travel arrangements for the MID. Research costs associated with travel and make recommendations to reduce costs. Negotiate flight, hotel and rental car reservations; book final travel arrangements. Develop and maintain a travel tracking log report and accompanying procedure to ensure conference registration forms and fees are submitted timely utilizing CalPERS travel procedures. Prepare travel itineraries and travel packets. Review Travel Expense Claims submissions against department policy before submitting for approval. Attend meetings with the Travel unit to communicate new rules and regulations to INVO.

- 20% Onsite¹ and virtually, serve as the SI board agenda coordinator and works with the Subject Matter Experts (SME) to prepare open and closed session agenda items and PowerPoint presentations for the CalPERS Investment Committee. This includes developing, editing and formatting presentations, reports and briefings for board meetings, committee workshops and conferences. Prepare, compose, and finalize correspondence and memos for signature. Review presentations and documents to ensure they meet CalPERS accessibility requirements (ADA compliance) prior to publication. Organizes and coordinates logistics for monthly team meetings as well as prepares, produces, and distributes monthly agenda and meeting materials.
- 15% Onsite¹ and virtually, play a lead role in performing research for the SI team on sustainability related matters and asset managers, performing data analytics using Microsoft Excel, and leveraging Artificial Intelligence for such tasks.
- 15% Onsite¹ and virtually, serve as a liaison between SI and the critical business areas regarding the coordination of recruitments, onboarding activities, and transactions. Maintain and update the hiring tracker log to reflect accurate status, deadlines, and task completion. Ensure delivery of onboarding communications and templates to hiring managers and new team members according to established deadlines. Assist team leaders in the development of interview questions, written exercises, and calendar coordination. Prepare all documentation to initiate contracts for services or subscriptions. Serve as a liaison between SI and the critical business areas regarding procurement activities. Review and analyze invoices for accuracy, scope of service, fee agreement, and appropriate deliverables. Process payments according to established procedures and follow up with CalPERS Financial Office when needed. Track payments and contract expirations. Facilitate the completion of required approval needed to complete the procurement process within the SI unit.
- 10% Onsite¹ and virtually, deliver on ad hoc projects and other duties, such as representing CalPERS with external vendors and service providers while supporting cross-enterprise or total fund projects which advance CalPERS sustainability initiatives.

Working Conditions

- ¹ This position is designated as office-centered and works primarily onsite at the Sacramento, CA - Headquarters at least three weekdays.
- Office equipment such as a computer, printer, and copier
- Sedentary – Exerts up to 10 lbs. of force occasionally and/or a negligible amount of force frequently or constantly to lift, carry push, pull, or otherwise move objects, including the human body. Involving sitting most of the time but may involve walking or standing for brief periods of time.

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:**