

DUTY STATEMENT

		EFFECTIVE DATE
BRANCH Administrative Services	POSITION NUMBER (Agency – Unit – Class – Serial) 815 - 265 - 5393 - 037	
DIVISION/UNIT Procurement Management Division/Compliance	CLASS TITLE Analyst II	
INCUMBENT NAME Vacant	WORKING TITLE Compliance Analyst	
CalSTRS is dedicated to securing the financial future and sustaining the trust of California's educators through customer service, accountability, leadership, strength, trust, respect, and stewardship.		
Under the direction of the Manager II of Procurement Management Division (PMD) Compliance, the incumbent is responsible for PMD policies, procedures, data analysis, reporting, compliance validation activities, and legislative analysis. The Compliance Analyst works with division leaders, General Counsel, and Enterprise Compliance Services (ECS) to ensure CalSTRS procurement, contracting, and travel activities are within all applicable laws, rules, regulations, and guidelines.		
% of time performing duties	Indicate the duties and responsibilities assigned to the position and the percentage of time spent on each. Group related tasks under the same percentage with the highest percentage first.	
	ESSENTIAL FUNCTIONS	
30%	Monitor multiple tracking systems and databases to review and confirm compliance activity of solicitations, contracts, and purchase orders (PO) for compliance requirements. Request updates to correct procurement documents and reporting fields to ensure all PMD policies and procedures are being followed and documented correctly within various technology platforms. Review reporting data within SAP Ariba, CalSTRS Disclosure Compliance (DC) site, and databases for accurate compliance reports. Communicate all required updates to leadership and monitor completion of the requests to correct reporting data.	
25%	Serve as an SAP Ariba subject matter generalist supporting system maintenance and operations. Conduct independent analysis to assess business needs and impacts across procurement modules. Provide recommendations to the Travel, Outreach, Partners Reportings, and Compliance (TOPC) Manager and procurement leadership on process changes, communication efforts and changes that impact the organization. Communicate with stakeholders the context in which business rules, processes and policies are applied. Identify and resolve issues and document evolving business processes and requirements to improve efficiency. Manage and provide incident updates, assessment requests, and various status communication to leadership.	
15%	Provide oversight and facilitate all PMD Policies review and approval on an annual basis and as needed for new policies. Notify leadership of the policies review schedule and request confirmation of any updates that are needed. Collaborate with PMD, General Counsel, and Enterprise Compliance Services (ECS) on policy updates and approvals. Organize and track updates, changes, and effective dates of all PMD policies. Review other branch's policies that affect procurement processes and monitor any changes that need to be communicated; notify leadership of these changes.	
10%	Support the PMD Compliance Specialist with CalSTRS 600H annual filing season to certify Key Personnel (KP) comply with the Teachers' Retirement Board Governance Manual's Third-Party Economic Interest Disclosure Policy. Assist with developing processes and procedures to update or monitor the CalSTRS' Disclosure Compliance (DC) site.	
10%	Review proposed and passed legislative bills to determine impact to CalSTRS procurement processes, policies, and procedures. Provide legislative analysis to leadership that outlines the requirements and synopsis of the impact with recommendations. Identify impacted procurement methods and current active procurement documents that may be affected and include in the legislative analysis. Review Department of General Services (DGS) Management Memos and any Governor's Executive Orders related to procurement and provide updates with an analysis to leadership that identifies any impact to current CalSTRS procurement processes, policies, and procedures. Collaborate with PMD, General Counsel, and other branches to update processes, policies, and procedures.	

5%

Develop, update, and monitor computer-based training (CBT) for Business Contract Managers and Travelers within the organization. Collaborate with the Procurement Management and Human Resources Divisions to update and assign training. Monitor progress of completion and provide status updates with reminders to leadership and trainees. Provide quarterly reports of key performance indicators (KPIs) for the annual training requirements to leadership and Executives.

5%

MARGINAL FUNCTIONS

Participate in special projects. Participate on departmental-wide, cross-functional work groups.

COMPETENCIES

Core Competencies. All employees are responsible for understanding and demonstrating CalSTRS' core competencies:

- Adaptability/Flexibility
- Communication
- Customer/Client Focus
- Teamwork
- Work Standards/Quality Orientation

Classification Competencies. All employees are expected to understand and demonstrate their position's CalSTRS class competencies located in the [Competency Guide](#) on Central.

CONDUCT AND ATTENDANCE EXPECTATIONS

- Communicate effectively with individuals from varied experiences, perspectives and backgrounds
- Deal with individuals in a tactful, congenial, personable manner
- Must maintain consistent and regular attendance
- Adhere to CalSTRS policies and procedures
- Ability to support and model CalSTRS Core Values

WORKING CONDITIONS AND PHYSICAL ABILITIES REQUIRED OF THE JOB

- Work in a high-rise building, in an open space environment
- Ability to use a computer keyboard several hours a day
- Read from computer screens several hours a day

Responsible for promoting a safe and secure work environment free from discrimination, harassment, inappropriate conduct, or retaliation by adhering to CalSTRS' policies and processes. Responsible for participating in mandated HR or EEO training workshops (i.e., Sexual Harassment, EEO, etc.).

To be reviewed and signed by the supervisor and employee:

SUPERVISOR'S STATEMENT:

- I HAVE DISCUSSED THE DUTIES AND RESPONSIBILITIES OF THE POSITION WITH THE EMPLOYEE
- I HAVE SIGNED AND RECEIVED A COPY OF THE DUTY STATEMENT

SUPERVISOR'S NAME (Print)

SUPERVISOR'S SIGNATURE

DATE SIGNED

EMPLOYEE'S STATEMENT:

- I HAVE DISCUSSED THE DUTIES AND RESPONSIBILITIES OF THE POSITION WITH MY SUPERVISOR
- I HAVE SIGNED AND RECEIVED A COPY OF THE DUTY STATEMENT
- I AM ABLE TO PERFORM THE ESSENTIAL FUNCTIONS LISTED WITH OR WITHOUT REASONABLE ACCOMMODATION
- I UNDERSTAND THAT I MAY BE ASKED TO PERFORM OTHER DUTIES AS ASSIGNED WITHIN MY CURRENT CLASSIFICATION, INCLUDING WORK IN OTHER FUNCTIONAL AREAS AS BUSINESS NEEDS REQUIRE

EMPLOYEE'S NAME (Print)

EMPLOYEE'S SIGNATURE

DATE SIGNED