

DUTY STATEMENT

		EFFECTIVE DATE
BRANCH	Administrative Services Branch	POSITION NUMBER (Agency – Unit – Class – Serial) 815 - 265 - 5393 - 031
DIVISION/UNIT	Procurement Management Division, Investments Procurement	CLASS TITLE Analyst II
INCUMBENT NAME	Vacant	WORKING TITLE Investment Procurement 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 Procurement Supervisor I, Investments Procurement Manager, the Analyst II operates as the Investment Procurement Analyst and is expected to provide high-quality analytical services to the Investments Branch, to process and execute the more complex CalSTRS investment-related solicitations, contracts, and purchase orders in alignment with CalSTRS policies; develop and manage investment procurement-related data; and develop solutions when challenges arise.		
% 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.	
25%	ESSENTIAL FUNCTIONS Independently draft solicitations, contracts, amendments, subscriptions, memberships, and other investment-related procurement documents. Draft and process the publishing of solicitations, addendums, marketing advertisements, and notices of intent to award. Coordinate logistics and facilitate solicitation consensus scoring evaluations, multi-phased interviews, and site visits/virtual product demonstrations with Procurement and Investments staff, executives, and the CalSTRS Investment Committee/Board. Manage the finalist selection process for all investment-related procurements. Manage post-award activities between awardees, CalSTRS Investments, and CalSTRS Investment Counsel staff.	
25%	Independently monitor the contract life cycle for investment manager agreements and advisory & consulting contracts. Draft contract documents and related exhibits; review proposed contract deviations and provide recommendations to mitigate potential risks, advising Procurement management, Investment General Counsel, and Investments professionals on best practices; and finalize agreed-upon terms. Act as the liaison between CalSTRS and contractors to coordinate contract execution within the established Service Level Agreements to maximize performance of the CalSTRS investment portfolio. Research, analyze, and develop solutions for investment procurement-related challenges.	
25%	Responsible for the data development and documentation of investment-related procurement and contract activities using SAP BusinessDirect, SharePoint, contract database(s), Excel matrices, and other investment contract information management system(s) for workload management and forecasting. Develop and prepare various monthly and quarterly mandated and ad-hoc reports.	
20%	Collaborate with the CalSTRS Investment General Counsel to resolve questions and ensure investment solicitations and contracts contain applicable language and terms and conditions that comply with CalSTRS Policies, State and Federal Codes, Statutes and Regulations.	
5%	MARGINAL FUNCTIONS Perform outreach, training, and other various special projects as needed, which include, but is not limited to participating in cross-organizational projects and system testing.	

COMPETENCIES

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

- Adaptability/Flexibility
- Communication

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- 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

- Occasional overnight in state/out of state travel
- Occasional travel to various locations for training and/or meetings
- Prolonged periods of standing or sitting
- 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
- Ability to move up to 10 pounds

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