CALSTRS
HOW WILL YOU SPEND YOUR FUTURE?

☐ PROPOSED

☒ CURRENT

DUTY STATEMENT

	EFFECTIVE DATE
BRANCH Office of the General Counsel	POSITION NUMBER (Agency – Unit – Class – Serial) 815 - 102 - 5393 - 002
DIVISION/UNIT Enterprise Information Management & Operations/Operations	CLASS TITLE Analyst II
INCUMBENT NAME Vacant	WORKING TITLE Legal Operations 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 direction of the Supervisor II, the Analyst II acts as the branch Legal Operations Analyst and is responsible for independently performing the more complex analytical tasks and responsibilities in support of the General Counsel's office including but not limited to: Contract management, invoice processing, budget tracking and training management. The incumbent will also perform various analytical and administrative, legal support to fellow Division and Branch staff.

% 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
35%	**Invoice Management:** Review, analyze, log, track, and manage all Branch invoices. Verify information on invoices is fully completed and ensure that all billing for services is accurate and in accordance with the associated contract; review contract agreements to ensure compliance. Collaborate with various divisions to schedule payments in a timely manner for all legal service invoices that are managed by the Office of the General Counsel. Ensure expenditure tracking sheets for each contract and purchase order (PO) are updated and reconciled with the system of record. Review, analyze and redact case information that falls under the attorney-client privilege prior to submission to corporate imaging.
20%	**Contract Management:** Work with Central Procurement staff and division staff to research and review Legal contracts. Lead efforts in creating and amending contracts for legal services, which can include term amendments, allocation amendments and generating a Request for Bid (RFB) to create new contracts. Act as the Legal Operations subject matter expert (SME) in preparing new contracts and contract amendments for management approval; act as the liaison between various divisions, external contractors, and contract offices to determine scope of work for required services. Prepare contract funding and term information; necessary paperwork such as: Scope of Work, rates, and required approvals for submission to procurement.
15%	Work closely with the Budget Office to ensure all contracts and other office expenditures are within the budget allotments. Analyze current budget allocations and make recommendations to the General Counsel on funding transfers or whether additional funding is required to avoid a lapse in necessary services for prior case management. Perform cost benefit analyses for contracts to determine if alternate contracts or terms would benefit the legal office and be more cost effective; provide recommendations when necessary.
15%	Serve as the branch training coordinator for the Office of the General Counsel. Develop and maintain division office procedures as they pertain to Travel, Ariba and training activities; provide recommendations and/or revisions to supervisors to improve efficiency and reduce errors. Review training requests from division staff and assess budget impacts; notify supervisor, when necessary. Ensure requests are appropriate and follow Ariba guidelines prior to inputting final requests into Ariba for procurement and processing.
10%	Provide back-up administrative support to the Office of General Counsel, including assistance on complex and/or sensitive legal projects, supporting board meetings and activities, telephone coverage, mail, service of process, overnight or express service deliveries, customer service, litigation preparation, and

	management reporting. Utilize program area expertise to review, analyze and extrapolate data from SAP Ariba system to independently create and prepare sensitive internal budget reports.
5%	**MARGINAL FUNCTIONS** Attend meetings and participate in internal workgroups and cross functional and enterprise-wide teams of CalSTRS, as assigned.

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

- 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

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