Duty Statement

Classification: **Analyst II**

Position Number: **275-200-5393-7XX**

HCM#: **1396**

Branch/Section: **Financial Office, Office of the CFO (OCFO)**

Location: **Sacramento, CA**

Working Title: **Administrative Analyst**

Effective Date: **January 1, 2026**

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

Supervision Exercised: ☐ **Yes** ☒ **No**

Telework: ☒ **Office-Centered** ☐ **Remote-Centered** ☐ **Not Eligible**

The mission of the CalPERS Financial Office (FINO) is to improve CalPERS financial management through coordination and centralization of all CalPERS finance activity. This is being accomplished by: creating a single point of accountability and coordination for financial management; creating a centralized and coordinated CalPERS finance area that properly budgets and forecasts CalPERS finances to support maximizing returns on investments; and enabling a higher level of internal control and transparency for all finance functions.

Under direction of the Supervisor II, the Analyst II performs a wide variety of complex budget-related tasks, administrative functions for the Financial Office, and analysis, including but not limited to the following:

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**.**

30% Onsite[1] and virtually, acts as the lead FINO Budget liaison to assist FINO and senior leadership with tracking the allocation of the division's budgets. Develops and maintains detailed budget and expenditure projections, ensuring accuracy and alignment with organizational goals. Collaborates with the budget analyst in the Financial Planning, Policy & Budgeting Division to identify and resolve potential budgetary concerns, providing documentation or other information necessary to maintain accurate budget and encumbrance records. Analyzes, tracks, and monitors all consultant invoices and contracts to ensure compliance with contract rules and guidelines. Conducts research on the more complex analytical projects to support budgetary decision-making. Prepares and develops various

reports to provide Executive Leadership and the Board information to make budgetary decisions. Assists in developing financial reports to provide executive team members and senior leadership with key information about CalPERS' budget and expenditures, encumbrances, resource utilization trends, potential savings, and current budget issues.

25% Onsite and virtually, independently creates requisitions by utilizing the PeopleSoft Financials System in order to process invoices, procure Non-IT and IT goods for the Financial Office. Coordinates with vendors to prepare and process purchase orders ensuring that all requests meet the organizational needs and are in line with budget constraints. Prepares, reviews, and submits procurement documents for contracts and/or purchase orders on PeopleSoft. Assists with duties affiliated with the procurement process. Researches price and availability of products and supplies specified. On a regular basis, monitors the supply room in order to restock and replenish to ensure team members are provided with office essentials in a timely manner. Communicates status of supplies and materials ordered upon request. Verifies materials and/or services received. Logs and completes documents for payments process and associate entries in PeopleSoft.

Onsite and virtually, monitors FINO's contracts, letter of engagements, and inter-agency agreements by analyzing contract terms, tracking contract cycles, processing, and tracking invoices, completing renewal documentation via Request for Proposals, Spring Fed Pools, inter-agency agreements or amendments processes. Assists as needed with contracting process to facilitate timely processing of contract documents.

15% Onsite and virtually, coordinates recruiting and onboarding activities for all hire types, including external hires, hires new to FINO, transfers within FINO and promotions. Maintains and updates the trackers to reflect accurate status, deadlines, and task completion. Ensures delivery of standardized onboarding communications and templates to hiring managers and new team members according to established deadlines. Assists team leaders and supervisors in the development of interview questions, rating sheets, written exercises, and other interview materials. Schedules interviews, completes reference checks, conducts official personnel file reviews, and submits related materials to HRSD. Monitors dependencies across teams and follows up on outstanding tasks as needed.

15% Onsite and virtually, serves as the back-up for gathering, reviewing, and organizing agenda items for the Finance & Administration Committee (FAC), ensuring accessibility and accuracy. Organizes and coordinates logistics for committee workshops, interviews, and ad hoc committee meetings, as well as prepares, produces, and distributes monthly agenda packet and meeting materials. Tracks follow-up action(s) on committee member requests and ensures the actions are addressed through the appropriate communication channel. Attends and assists committee members and participants at all committee meetings.

Onsite and virtually, acts as the back-up Human Resources Liaison (HRL) for human resources related projects and assignments under the guidance of the lead. Reviews recruitment documents and justification packets for position changes. Responds to personnel-related inquiries, submits recruitment requisitions and submits transactions. Assists with eTimesheet coordination which includes running queries related to eTimesheet completion and resolving exceptions. Performs other duties related to personnel duties in the absence of the lead HRL.

Onsite and virtually, serves as the back-up space planning and division furniture contact

coordinator, gathering information and organizing team member moves to ensure efficient space utilization. Coordinates facility-related requests for FINO, including badges, telephones, space planning, furniture requests, and ergonomic evaluations.

Onsite and virtually, provides administrative support as a back-up for desktop support and PC Contact for ordering and maintaining equipment and support supplies for various office equipment.

10% Onsite and virtually, reviews and responds to special project assignments that require additional research. Analyzes and documents project requirements and deliverables for alignment with program goals. Prepares and delivers reports, presentations, and briefings to senior leadership and project stakeholders. Using Microsoft Office applications, prepares written recommendations, correspondence, policy documents, procedural guidelines, and operational protocols. Maintains project documentation and ensures proper recordkeeping and compliance with organizational standards. Utilizes accessibility remediation software (CommonLook PDF and CommonLook Office) and performs accessibility checks to ensure office-wide documents are Americans with Disability Act (ADA) compliant prior to dissemination. Reviews and revises PDF tagging structures to meet current ADA compliance guidelines. Collaborates with technical team members to make ADA accessibility revisions on documents. Tracks project statuses and creates project status reports for leadership to ensure milestones and deliverables are met.

5% Onsite and virtually, provides support (i.e., completing research, obtaining documents, completing follow-up requests, providing desktop training, etc.) to team members within the Financial Office. Provides biweekly updates to the unit team leader on daily tasks and requests, project updates, and workload tracking. Attends and participates in unit, cross-divisional, and multi-department meetings and discussions. Performs other duties as assigned that are appropriate for the classification.

Working Conditions

- [1] This position is designated as office-centered and works primarily onsite at the Sacramento, CA - Headquarters at least three weekdays.
- Works with and moves PC equipment.

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**:

Duty Statement

Classification: **Analyst I**

Position Number: **275-200-5157-7XX**

HCM#: **1396**

Branch/Section: **Financial Office, Office of the CFO (OCFO)**

Location: **Sacramento, CA**

Working Title: **Administrative Analyst**

Effective Date: **January 1, 2026**

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

Supervision Exercised: ☐ **Yes** ☒ **No**

Telework: ☒ **Office-Centered** ☐ **Remote-Centered** ☐ **Not Eligible**

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Under the supervision of the Supervisor II, the Analyst I utilizes basic analytical skills in performing the following functions:

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**.**

30% Onsite[1] and virtually, serves as the FINO Budget liaison to assist FINO and senior leadership with tracking the allocation of the division's budgets. Develops and maintains detailed budget and expenditure projections, ensuring accuracy and alignment with organizational goals. Collaborates with the budget analyst in the Financial Planning, Policy & Budgeting Division to identify and resolve potential budgetary concerns, providing documentation or other information necessary to maintain accurate budget and encumbrance records. Analyzes, tracks, and monitors all consultant invoices and contracts to ensure compliance with contract rules and guidelines. Conducts research and completes analytical projects to support

budgetary decision-making. Prepares and develops various reports to provide Executive Leadership and the Board information to make budgetary decisions. Assists in developing financial reports to provide executive team members and senior leadership with key information about CalPERS' budget and expenditures, encumbrances, resource utilization trends, potential savings, and current budget issues.

25% Onsite and virtually, under the direction of the Supervisor II, creates requisitions by utilizing the PeopleSoft Financials System in order to process invoices, procure Non-IT and IT goods for the Financial Office. Coordinates with vendors to prepare and process purchase orders ensuring that all requests meet the organizational needs and are in line with budget constraints. Prepares, reviews, and submits procurement documents for contracts and/or purchase orders on PeopleSoft. Assists with duties affiliated with the procurement process. Researches price and availability of products and supplies specified. On a regular basis, monitors the supply room in order to restock and replenish to ensure team members are provided with office essentials in a timely manner. Communicates status of supplies and materials ordered upon request. Verifies materials and/or services received. Logs and completes documents for payments process and associate entries in PeopleSoft.

Onsite and virtually, assists with the coordination and monitoring of FINO's contracts, letter of engagements, and inter-agency agreements by analyzing contract terms, tracking contract cycles, processing, and tracking invoices, completing renewal documentation via Request for Proposals, Spring Fed Pools, inter-agency agreements or amendments processes. Assists as needed with contracting process to facilitate timely processing of contract documents.

15% Onsite and virtually, coordinates recruiting and onboarding activities for all hire types, including external hires, hires new to FINO, transfers within FINO, and promotions. Maintains and updates the trackers to reflect accurate status, deadlines, and task completion. Ensures delivery of standardized onboarding communications and templates to hiring managers and new team members according to established deadlines. Assists team leaders and supervisors in the development of interview questions, rating sheets, written exercises, and other interview materials. Schedules interviews, completes reference checks, conducts official personnel file reviews, and submits related materials to HRSD. Monitors dependencies across teams and follows up on outstanding tasks as needed.

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Onsite and virtually, acts as the back-up Human Resources Liaison (HRL) for human resources related projects and assignments under the guidance of the lead. Reviews recruitment documents and justification packets for position changes. Responds to personnel-related inquiries, submits recruitment requisitions using the Start Talent Acquisition Request (STAR) system, and submits transactions in PeopleSoft Human Capital Management (HCM) system. Assists with eTimesheet coordination which includes running queries related to eTimesheet completion and resolving exceptions. Performs other duties related to personnel duties in the absence of the lead HRL.

Onsite and virtually, serves as the back-up space planning and division furniture contact coordinator, gathering information and organizing team member moves to ensure efficient space utilization. Coordinates facility-related requests for FINO, including badges, telephones, space planning, furniture requests, and ergonomic evaluations.

Onsite and virtually, provides administrative support as a back-up for desktop support and PC Contact for ordering and maintaining equipment and support supplies for various office equipment.

10% Onsite and virtually, reviews and responds to special project assignments that require additional research. Analyzes and documents project requirements and deliverables for alignment with program goals. Prepares and delivers reports, presentations, and briefings to senior leadership and project stakeholders. Using Microsoft Office applications, prepares written recommendations, correspondence, policy documents, procedural guidelines, and operational protocols. Maintains project documentation and ensures proper recordkeeping and compliance with organizational standards. Utilizes accessibility remediation software (CommonLook PDF and CommonLook Office) and performs accessibility checks to ensure office-wide documents are Americans with Disability Act (ADA) compliant prior to dissemination. Reviews and revises PDF tagging structures to meet current ADA compliance guidelines. Collaborates with technical team members to make ADA accessibility revisions on documents. Tracks project statuses and creates project status reports for leadership to ensure milestones and deliverables are met.

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Working Conditions

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- Works with and moves PC equipment.

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**: