



Duty Statement

Classification: **Associate Governmental Program Analyst**

Position Number: **275-670-5393-004**

HCM#: **3140**

Branch/Section: **Investment Office / Investment Compliance & Operational Risk**

Location: **Sacramento, CA**

Working Title: **Program Business Services Analyst**

Effective Date: **February 1, 2025**

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 Investment Controls & Operational Risk (ICOR) Division trade controls, policy testing, benchmark and policy governance activities, operational due diligence, and overall support for the operational risk control environment of the Investment Office.

Under the direction of the Investment Director (ID), the Associate Governmental Program Analyst (AGPA) will provide a variety of complex technical analytical and administrative support duties to ICOR business operations. The AGPA 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.

45% Onsite¹ and virtually, support the day-to-day strategy and execution activity for ICOR, including planning, organizing, and administration of tasks associated with trade controls, operational due diligence, and operational risk strategy efforts. Tasks will include maintaining and updating of ICOR desktop procedures, operating plans and project logs, scheduling and

developing agendas for ICOR senior staff and team meetings, creating and updating periodic presentations such as quarterly management reports and Investment Committee agenda items and providing support to ICOR's designated Secretariats of INVO's governance committees.

- 45% Onsite and virtually, independently analyze existing workflow systems, information management, documentation of policies and procedures, and ensure execution continuity of file controls; including but not limited to the maintenance and revision of and revising existing internal policies and procedures associated with INVO Control and Compliance programs. Support policy and procedures testing associated with INVO Investment programs. Ensure policy and Public Employees' Retirement Law (PERL) required reporting is completed by INVO staff in a timely and accurate manner. Provide recommendations to ICOR management on revisions to existing ICOR operations.
- 10% Onsite and virtually, perform other duties as assigned by the Investment Director (ID) that are appropriate for the classification. Under specific guidance and direction, undertake special projects as assigned by the senior ICOR staff that may be complex and sensitive in nature.

Working Conditions

- ¹ This position is designated as office-centered and works primarily onsite at the Sacramento, CA - Headquarters at least three weekdays.
- Team environment with multiple daily responsibilities and a regular change management.
- Use of office equipment such as computers and copiers.
- Work in a climate-controlled office under artificial lighting, exposure to computer screens and other basic office equipment, office space is open with low-walled cubicles, fast paced environment.
- Sedentary – involves sitting most of the time but may involve walking or standing for brief periods of time.
- Overtime may be required.

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: