

DUTY STATEMENT

		EFFECTIVE DATE
BRANCH Administrative Services	POSITION NUMBER (Agency – Unit – Class – Serial) 815 - 265 - 4801 - 003	
DIVISION/UNIT Procurement Management/Investments Procurement Unit	CLASS TITLE Staff Services Manager II (Supervisory)	
INCUMBENT NAME	WORKING TITLE Investments Procurement Manager	
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 Staff Services Manager III, Acquisitions Manager, the Investments Procurement Manager (Staff Services Manager II) is responsible to organize and oversee all activities related to the execution of CalSTRS investment solicitations and contracts, service purchase orders, and other procurement functionalities and goals of the CalSTRS Strategic Plan. This position is supported by the Investments Procurement unit.		
% 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.	
35%	ESSENTIAL FUNCTIONS Responsible for overseeing solicitations, contracts, amendments, and purchase orders and provide direction for the development of all investment-related procurement activities. Review and approve the publishing of solicitations, addendums, marketing advertisements, and notices of intent to award. Oversee post-award activities between awardees, CalSTRS Investments, and CalSTRS Investment Counsel staff. Recruit committees for solicitation evaluations, interviews, and onsite visits. Develop scoring methodologies and facilitate consensus scoring evaluations and multi-phased interviews with Investments staff, executives, and the CalSTRS Investment Committee/Board. Manage logistics, prepare speaking points for CalSTRS executives and/or Board members, and manage the finalist selection process for all investment-related procurements. Review and approve the publishing of solicitations, addendums, marketing advertisements, and notices of intent to award. Monitor post-award activities between awardees, CalSTRS Investments, and CalSTRS Investment Counsel staff.	
25%	Provide management oversight of the contract life cycle and complex agreements for CalSTRS Board consultants, master custodian services, and other highly visible external investment managers and investment advisors. Review proposed contract deviations; provide recommendations to mitigate potential risks, advising Procurement management, Investment Counsel, and Investments professionals on best practices; and facilitate contract negotiations between CalSTRS Investments and contractors to in order to maximize performance of the CalSTRS investment portfolio.	
25%	Provide management oversight to Investment-related data collection/management and other Procurement data collections efforts, as required. Perform oversight of investment procurement and contract activities. Present to the CalSTRS Board, Investment Committee, Investments Office, Financial Services management and other internal and external interest groups.	
10%	Interact with CalSTRS Investment Counsel, Legal Services, and General Counsel Operations teams to resolve questions and ensure investment contracts contain terms and conditions that comply with CalSTRS Investment Policies, State and Federal Codes, Statutes and Regulations, and are subject to Public Records Requests.	
5%	MARGINAL FUNCTIONS Monitor legislation that may impact CalSTRS investment procurement and contract related activities to prepare analyses and recommendations for investment and procurement leaders. Mentor, cross-train, and provide oversight to dedicated resource staff.	
COMPETENCIES <u>Core Competencies.</u> All employees are responsible for understanding and demonstrating CalSTRS' core competencies: Adaptability/Flexibility		

815-xxx-xxxx-xxx

- 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:

- Change Leadership
- Decision Making
- Developing Others
- Ethics and Integrity
- Influencing Others
- Initiative
- Monitoring
- Results Orientation
- Risk Management
- Team Leadership
- Vision and Strategic Thinking

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 travel to various locations for meetings/onsite visits
- Prolonged periods of sitting
- Work in a high-rise building, in an open space environment
- Teleworking independently
- 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