☐ PROPOSED

☐ CURRENT

CALSTRS
HOW WILL YOU SPEND YOUR FUTURE?

DUTY STATEMENT

	EFFECTIVE DATE
BRANCH Financial Services	POSITION NUMBER (Agency – Unit – Class – Serial) 815 - 236 - 4800 - 002
DIVISION/UNIT Financial Planning, Accounting & Reporting/Budgets Operations/Budget Management	CLASS TITLE Staff Services Manager I
INCUMBENT NAME	WORKING TITLE Budget Management 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, the Staff Services Manager I (SSM I) manages and directs the work and activities of a team of budget analysts and a student assistant in the Budget Management office. The SSM I functions as a working supervisor and assists the SSM III with budgetary assignments and projects that are considered difficult and complex. The SSM I also collaborates and assists the SSM III with various budgetary projects and requests from the Division Director, Executives and other senior leadership.

% 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%	Provide direct supervision to a team of budget staff in the planning, coordination and monitoring of CalSTRS' operating, program, and project budgets. Direct staff in the preparation of monthly expenditure reports and ensure sufficient resources are available for projected expenditures. Consult with program management to ensure estimates are accurate, prior to presenting budgetary reports to Executives and the Board. Attend Board meetings to obtain an understanding of the strategic direction that the Board sets for CalSTRS. Oversee the process for administratively establishing positions and evaluating requests; confirm that funds are sufficient and appropriate. Evaluate and approve budget transfers made in BusinessDirect (BD) to ensure they are correct, properly supported and processed in a timely manner. Coordinate and review the analysis of the fiscal and budgetary impacts of bills and/or chaptered legislation; analyze and the more complex bills. Ensure staff are properly trained with BD processes and procedures; provide additional training, when necessary.
35%	Oversee the annual Budget Change Request (BCR) process which entails a significant amount of analysis, writing and coordination with other branches and divisions to develop a coherent request for positions and/or funding. Prepare and support the Chief Financial Officer (CFO) for meetings with Executives regarding current budget projections and performance. Advise program areas on all phases of budget preparation. Provide fiscal and budgetary solutions and recommendations to senior management on budgetary requests, including all transactions. Ensure budgetary practices are legal, efficient, and internal controls are regularly practiced. Collaborate with the Budget Development and Reporting team on Budget Change Proposals (BCPs) and understand the impacts to applicable business and program areas. Address organizational fiscal and budgetary issues that may require policy revisions and implementation. Recommend internal budget policies and procedures; maintain accountability and quality control for all fiscal transactions system wide.
25%	Develop and coordinate the preparation and submission of budget reports to Executives. Perform complex, special projects related to workload analysis, cost benefit analysis, productivity and organizational structure changes, at the request of the Division Director, Executives and/or senior management. Participate in the development of strategic planning goals, objectives and measures. Provide annual training to CalSTRS leadership on budget fundamentals. Provide training to staff and leadership regarding budget processes within BD.
	MARGINAL FUNCTIONS
5%	Act on behalf of the Senior Budget Manager in their absence.

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:

- Change Leadership
- Conflict Management
- Decision Making
- Developing Others
- Empowering Others
- Ethics and Integrity
- Managing Work
- Planning and Organizing
- 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

- 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