

CALIFORNIA STATE TREASURER'S OFFICE

POSITION DUTY STATEMENT

PROPOSED

CURRENT

DIVISION OR BCA Executive Office				POSITION NUMBER (Agency-Unit-Class-Serial) 820-100-4800-001		Position ID 72
UNIT Executive Office				CLASSIFICATION TITLE Staff Services Manager		
TIME BASE / TENURE Full Time	CBID S01	WWG E	COI Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	MCR 2	WORKING TITLE Staff Services Manager I	
LOCATION Sacramento				INCUMBENT		EFFECTIVE DATE
STATE TREASURER'S OFFICE MISSION						
The State Treasurer's Office (STO) provides banking services for state government with goals to minimize banking costs and maximize yield on investments. The Treasurer is responsible for the custody of all monies and securities belonging to or held in trust by the state; investment of temporarily idle state and local government monies; administration of the sale of state bonds, their redemption and interest payments; and payment of warrants drawn by the State Controller and other state agencies.						
COMMITMENT TO DIVERSITY, EQUITY, AND INCLUSION						
The California State Treasurer's Office (STO) is committed to building and fostering a diverse workplace. We believe cultural diversity, backgrounds, experiences, perspectives, and unique identities should be honored, valued, and supported. We believe all staff should be empowered. The STO is proud to foster inclusion and representation at all levels of the Department.						
DIVISION OR BCA OVERVIEW						
BRIEFLY DESCRIBE THE DIVISION/UNIT FUNCTIONS The Executive Office of the State Treasurer's Office formulates and develops policy and acts in an advisory capacity to the State Treasurer. The executive staff consists of Deputy Treasurers, Public Information Office, Legislative Coordinator, Legal Counsel and the heads of the following divisions.						
GENERAL STATEMENT						
BRIEFLY (1 OR 2 sentences) DESCRIBE THE POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS Under the direction and the supervision of the Pension and Benefits Officer, this position performs complex program evaluations while serving as the Treasurer's representative and trustee to the CA Public Employees' Retirement System (CalPERS) and the CA Teachers' Retirement System (CalSTRS) Boards and related committees. This position also reports to the Chief Deputy Treasurer and performs administrative tasks as well as researches and analyses on which decisions or recommendations may be based.						
% 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.					
45%	Provides staff support and expertise to the State Treasurer in his/her responsibilities related to serving on the boards of the CA Public Employees' Retirement System (CalPERS) and the CA State Teachers' Retirement System (CalSTRS); acts as the Treasurer's representative on the pension boards' various committees related to the development and approval of major pension and health care policies regarding members' needs for improved retirement benefits and services, health insurance costs and benefits, and the manner in which health insurance is administered and provided; as a designated representative of the State Treasurer, any action taken by this position is binding. Under the direction of the Pension and Benefits Officer, reviews all board and committee meeting materials and briefs on pertinent issues; advises on sensitive and complicated issues related to the pension funds' operations and policies; with direction from the from the Pension and Benefits Officer, acts on his/her behalf at these meetings and is required to advocate positions on behalf of the Treasurer in public forums including making presentations; writes post meeting summaries; researches special pension/insurance related topics; analyzes financial data such as program budgets and financial statements, actuarial valuations; and assists with correspondence and inquires.					
30%	Under the direction of the Pension and Benefits Officer, analyzes policy issues and develops policies and/or policy reports related to pension fund, health care, insurance and retirement security issues; researches the latest and emerging trends, concerns and issues; analyzes financial data such as program budgets and financial statements, actuarial valuations; advises the Treasurer and the Pension and Benefits Officer on policy issues; acts in the place of the Treasurer and the Pension and Benefits Officer in their absence to oversee the policy functions at meetings and public proceedings, and in contacts with representatives of public and private entities.					
20%	Completes Special projects that are highly sensitive and a priority to the Treasurer and the Executive staff, including but not limited to developing and implementing programs, as well as taking the lead on particularly					

	sensitive or complex retirement, health and insurance related matters; and prepares memos relating to policy research and data analysis performed.
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5%	Performs other job-related duties as assigned.
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SPECIAL REQUIREMENTS

N/A

To be reviewed and signed by the supervisor and employee:

EMPLOYEE'S STATEMENT:

- *I HAVE DISCUSSED THE DUTIES AND RESPONSIBILITIES OF THE POSITION WITH MY SUPERVISOR AND RECEIVED A COPY OF THIS DUTY STATEMENT.*

EMPLOYEE'S NAME (Print)	EMPLOYEE'S SIGNATURE	DATE
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SUPERVISOR'S STATEMENT:

- *I CERTIFY THIS DUTY STATEMENT REFLECTS CURRENT AND AN ACCURATE DESCRIPTION OF THE ESSENTIAL FUNCTIONS OF THIS POSITION*
- *I HAVE DISCUSSED THE DUTIES AND RESPONSIBILITIES OF THE POSITION WITH THE EMPLOYEE AND PROVIDED THE EMPLOYEE A COPY OF THIS DUTY STATEMENT.*

SUPERVISOR'S NAME (Print)	SUPERVISOR'S SIGNATURE	DATE
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