



HOW WILL YOU SPEND YOUR FUTURE?

PROPOSED

CURRENT

DUTY STATEMENT

EFFECTIVE DATE

BRANCH Investments	POSITION NUMBER (Agency – Unit – Class – Serial) 815 - 350 - 4697 - 001
DIVISION/UNIT DCIO/Sustainable Investment & Stewardship Strategies (SISS)	CLASS TITLE Portfolio Manager, CalSTRS
INCUMBENT VACANT	WORKING TITLE Portfolio 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 Senior Portfolio Manager of Sustainable Investment & Stewardship Strategies (SISS), the Portfolio Manager manages and provides a high level of expertise and leadership to the SISS team. This position is responsible for the management of the CalSTRS Stewardship Program and provides critical subject matter expertise on a wide variety of sustainability considerations affecting the investment portfolio, with emphasis on the board’s Stewardship Priorities.

% 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.
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35%	<p>ESSENTIAL FUNCTIONS</p> <p>Manages CalSTRS Stewardship Program to influence the financial markets to address material sustainability risks. Manages all stewardship activities including proxy voting, company engagements, and communicating CalSTRS position and thought leadership to regulatory bodies, the Legislature, and/or standard-setting organizations. Collaborate with the Director of SISS and the SISS SPM to manage CalSTRS stewardship activities to promote sustainable business practices and public policy that drive and support long-term value creation Participate in Investment Committee meetings and deliver formal presentations that assist the committee in rendering decisions on sensitive, high profile public policy and controversial stewardship-related issues.</p>
20%	<p>Provide technical expertise on internal engagements with Public Affairs and external engagements in the broader investment industry, with the media relating to CalSTRS Stewardship Priorities, in coordination with the SISS Senior Portfolio Manager, develop internal presentations and broader communications materials related to CalSTRS stewardship activities.</p>
15%	<p>Manage the building of strategic relationships and the development of partnerships with aligned interests to advance CalSTRS goals and initiatives by serving as a catalyst to the investment management marketplace. Maintain professional contacts in the investment industry and represent CalSTRS on advisory bodies, investment forums and regulatory forums on sustainability issues affecting the investment portfolio. Support the SISS Strategic Relations team in their efforts to communicate and engage with CalSTRS stakeholders.</p>
15%	<p>Supervises staff and participate in the personnel processes including recruitment, hiring, training and Performance Management, in accordance with CalSTRS practices and State Personnel Board laws, regulations and policies and procedures. This includes but is not limited to: mentoring and developing staff, evaluating the work of staff, providing consistent and ongoing feedback to staff, including the completion of Annual Performance Reviews (APR), Individual Development Plans (IDP) and probationary reports.</p>
10%	<p>Support the SISS Director and collaborate with fellow Portfolio Managers and Associate Portfolio Managers in managing the SISS team’s strategy across its three primary areas of activity: Investment Portfolio, Stewardship and Strategic Relations and in supporting the Investment Branch’s strategic priorities: Net Zero Portfolio Emissions and Diversity in Investment Management.</p>
5%	<p>MARGINAL FUNCTIONS</p> <p>Serve as a senior manager representative for the SISS team, and organization-wide forums and project teams. Act on behalf of the Senior Portfolio Manager, SISS, in their absence.</p>

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:

- Adaptability and Change Leadership
- Investment Focus and Component Performance
- Communication, Negotiation and Relationship Development
- Teamwork and Team leadership
- Quality Work Standards and Initiative
- Ethical Decision Making and Risk Management
- Strategic Thinking and Implementation
- Investment Landscape and Organizational Awareness

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 overnight in state/out of state travel and international travel
- Occasional travel to various locations for training and/or meetings
- 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