

**POSITION DUTY STATEMENT**

STO 1000 (Rev 11/2025)

DIVISION OR BCA Information Technology (IT)					POSITION NUMBER (Agency-Unit-Class-Serial) 820-730-1404-001	Position ID 137
UNIT Workplace and Collaboration Services					CLASSIFICATION TITLE Information Technology Supervisor II	
TIME BASE / TENURE Full Time/Permanent	CBID S01	WWG E	COI Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	MCR 1	WORKING TITLE Microsoft365 Platform Supervisor	
LOCATION Sacramento					INCUMBENT	EFFECTIVE DATE
<b>STATE TREASURER’S OFFICE MISSION</b>						
<p>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.</p>						
<b>DIVISION OR BCA OVERVIEW</b>						
<p><b>BRIEFLY DESCRIBE THE DIVISION/UNIT FUNCTIONS</b></p> <p>The Information Technology Division (ITD) is the internal technology service organization that provides information processing support to the Divisions of the State Treasurer's Office and its associated Boards, Commissions, and Financing Authorities. The mission of the ITD is to assist the Divisions, Boards, Commissions, and Financing Authorities in achieving their program objectives through the efficient and effective delivery of quality information technology products and services.</p> <p>This mission is accomplished through the combined efforts of several ITD teams: Cybersecurity, Technology Acquisition, Application Management, IT Service Desk, Collaboration Services, and Network and Systems Support. Working together, these IT teams offer a full range of services, including application development and modernization, data center and cloud services, information security, network engineering and support, infrastructure development, equipment and software procurement, desktop support, web presence, technology-related project management, and technical support for new and emerging technologies.</p>						
<b>GENERAL STATEMENT</b>						
<p><b>BRIEFLY (1 OR 2 sentences) DESCRIBE THE POSITION’S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS</b></p> <p>Under general direction of the CIO and the Deputy CIO (an Information Technology Manager II), incumbent holds management responsibility for Workplace and Collaboration Services section in ITD. This includes leading and directing subordinate staff, and tasks such as planning, organization, staffing, and directing all functions within workplace and collaboration services to successfully achieve the section's objectives.</p> <p>The Microsoft365 Platform Supervisor is responsible for managing the delivery of a range of IT services related to workplace productivity and collaboration tools. This role ensures efficient and effective operations and the management of various workplace technologies.</p>						
<b>% of time performing duties</b>	<b>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.</b>					
40%	<p>Provide day-to-day supervision, technical oversight, and lead subordinate staff in the following service areas.</p> <p><b>Microsoft 365 Productivity and Collaboration Services</b></p> <p><b>Identity and Access Management</b></p> <ul style="list-style-type: none"> <li>• Manage Microsoft Entra ID to ensure secure and efficient user access to systems and resources.</li> <li>• Implement and enforce identity and access policies and best practices.</li> </ul> <p><b>Email Services</b></p> <ul style="list-style-type: none"> <li>• Oversee Microsoft Exchange Online email services to ensure reliable communication for all users.</li> </ul> <p><b>Messaging and Collaboration</b></p> <ul style="list-style-type: none"> <li>• Manage messaging and collaboration tools, including Microsoft Teams and Polycom, to facilitate effective communication and collaboration among employees.</li> </ul> <p><b>File Sharing and Storage</b></p>					

	<ul style="list-style-type: none"> <li>Supervise file sharing and storage solutions, including file servers and Microsoft OneDrive, ensuring data accessibility and security.</li> </ul> <p><b>Document and Enterprise Content Management</b></p> <ul style="list-style-type: none"> <li>Oversee document and enterprise content management systems, including Microsoft SharePoint Online and KnowledgeLake, to maintain organized and accessible information repositories.</li> </ul> <p><b>Endpoint Management</b></p> <ul style="list-style-type: none"> <li>Manage Microsoft Intune to ensure secure and compliant mobile device management, cloud connected and on-premises endpoints management including software distribution and updates/patches.</li> <li>Manage Microsoft Defender to ensure endpoint security.</li> </ul> <p><b>Data Loss Prevention</b></p> <ul style="list-style-type: none"> <li>Implement and monitor data loss prevention measures using Microsoft Purview to protect sensitive information.</li> </ul>
20%	<p><b>Management/Supervisory</b></p> <p><b>Strategic Planning</b></p> <ul style="list-style-type: none"> <li>Identify opportunities for technology innovation and improvements in workplace and collaboration services.</li> <li>Develop roadmaps for future technology initiatives.</li> </ul> <p><b>Project Planning and Management</b></p> <ul style="list-style-type: none"> <li>Define project scopes, objectives, and deliverables for workplace and collaboration services related projects.</li> <li>Develop project plans, timelines, and resource allocation.</li> <li>Monitor project progress, identify and mitigate risks.</li> <li>Coordinate with stakeholders to ensure alignment with business goals.</li> <li>Manage project budgets and resource allocation.</li> <li>Participate in preparing budget documents, including Project Approval Lifecycle (PAL) and Budget Change Proposals (BCP).</li> </ul> <p><b>Team Leadership and Management</b></p> <ul style="list-style-type: none"> <li>Provide leadership, mentorship, and performance evaluations.</li> <li>Foster a collaborative and innovative team culture.</li> <li>Allocate tasks and responsibilities effectively.</li> <li>Reviews work products for completeness, accuracy, and fulfillment of assignment requirements.</li> <li>Create staff succession plan and back up coverage plan to ensure operational resiliency.</li> <li>Ensure professional development and training for team members.</li> </ul>
15%	<p><b>Documentation</b></p> <ul style="list-style-type: none"> <li>Create and maintain documentation for workplace and collaboration services policies and procedures, including IT service desk procedures, incident management workflows, and user guidelines.</li> <li>Build and manage a comprehensive knowledge base that includes FAQs, troubleshooting guides, and solutions for common user issues.</li> <li>Create instructional materials and documentation for user education on workplace and collaboration tools, ensuring that users have access to relevant resources.</li> </ul>
15%	<p><b>Communication and Stakeholder Engagement</b></p> <ul style="list-style-type: none"> <li>Communicate project status and updates to executive leadership and stakeholders.</li> <li>Collaborate with cross-functional teams (e.g., technology acquisition, cybersecurity, etc.)</li> <li>Ensure effective communication within the team.</li> <li>Establish and track tasks, priorities, dependencies, status and completion dates.</li> <li>Report progress on projects and activities in meetings and provide regular written status reports.</li> <li>Communicate effectively and develop and sustain cooperative working relationships with internal and external business partners.</li> </ul>
5%	<p><b>Research and Innovation</b></p> <ul style="list-style-type: none"> <li>Stay up-to-date with industry trends, emerging technologies, and best practices.</li> <li>Research and evaluate new tools, frameworks, and technologies for potential adoption.</li> </ul>

	<ul style="list-style-type: none"> <li>Propose innovative solutions to enhance application performance, security, and user experience.</li> </ul>
5%	Perform other related duties as required

**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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