



HOW WILL YOU SPEND YOUR FUTURE?

PROPOSED

CURRENT

DUTY STATEMENT

EFFECTIVE DATE

BRANCH Office of the General Counsel	POSITION NUMBER (Agency – Unit – Class – Serial) 815 - 102 - 5795 - 018
DIVISION/UNIT Office of the General Counsel	CLASS TITLE Attorney III
INCUMBENT NAME Vacant	WORKING TITLE Special Counsel

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 general direction of the General Counsel, the Attorney III acts as the Special Counsel and provides direct legal support for the General Counsel across a broad range of legal issues and tasks and operates at the full journey level. The incumbent performs detailed legal research, analysis, drafts legal documents, memos, written analyses, articles, and presentations. The Special Counsel provides legal advice and analysis on the more complex legal matters arising in connection with CalSTRS’ activities, including, board governance, fiduciary duties, securities litigation, benefits, financial and investment issues, compliance with laws relating to public agencies, legislation and regulations, conflict of interest, public record access, confidentiality, contracting, work authorization and business immigration, and personnel issues including investigations, reasonable accommodations, and other labor and employment legal issues.

% 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>Perform advanced level/in-depth legal research and analysis, draft legal documents, memos, analytical writings, articles, slide presentations and other material on a broad range of legal topics under the general direction and in support of the workload of the General Counsel. Provide legal review and analysis on proposed and active domestic and foreign Securities and Anti-Trust Litigation. Review, approve, and advise on reasonable accommodation requests and other diverse labor and employment law issues. Conduct research, gather information and provide legal analysis and advice on complex technology issues including the use of Generative Artificial Intelligence. Prepare and make presentations of a variety of legal topics and provides legal representation to all programs and functions within CalSTRS as directed.</p>
30%	<p>Provide formal and informal oral and written advice on the more complex legal matter; prepare and make informal and formal presentations; conduct in-depth legal research; interpret laws and regulations; studies, interpret and apply laws, judicial precedent, and other legal authorities in connection with legal issues identified in review of the business and organizational activities of CalSTRS.</p> <p>Work in an advanced general capacity to support all program areas, and as requested by the General Counsel or Deputy Chief Counsel. Review and prepare responses to requests for information pursuant to the California Public Records Act. Provide analysis, advice, and representation on personnel issues.</p>
20%	<p>Attend the meetings of the Teachers’ Retirement Board and its committees. Assist the General Counsel and/or Deputy Chief Counsel in drafting and finalizing materials for the board and committee meetings and preparing for and presenting information and recommendations on various legal issues; prepare meeting minutes and summaries as assigned; prepare for and present matters for consideration by the board; and draft notices of decisions and orders. Prepare recommendations for updates to the Board Governance Manual and ensure legal compliance with the Board Governance Manual. Provide guidance to the board and staff on compliance with the public meeting laws and research and draft justifications for closed session discussions.</p>
10%	<p>Review contracts and contract proposals for legal issues and consistency; provide ongoing advice and guidance in the contractual process and draft and review all types of legal documents, including contracts, leases, memoranda, and pleadings.</p> <p>Analyze, review, and draft regulations and state and federal legislation. Analyze impacts related to CalSTRS’ activities, including, litigation, benefits, financial and investment issues, compliance with laws relating to public agencies, conflict of interest, public record access, confidentiality, contracting and</p>

personnel issues. Prepare and review internal CalSTRS polices in conjunction with CalSTRS business areas and Enterprise Compliance Services.

5%

MARGINAL FUNCTIONS

Participate in department-wide projects requiring Office of the General Counsel participation as assigned.

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 located in the [Competency Guide](#) on Central.

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
- Support and model CalSTRS Core Values

WORKING CONDITIONS AND PHYSICAL ABILITIES REQUIRED OF THE JOB

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