

OFFICE OF THE STATE CONTROLLER

PROPOSED

DUTY STATEMENT

EMPLOYEE NAME:	DIVISION: Executive Office
CLASSIFICATION TITLE Staff Services Manager II, Managerial	UNIT NAME – LOCATION: San Francisco, California
WORKING TITLE	POSITION NUMBER 051-720-4969-XXX
INFORMATION TECHNOLOGY DOMAIN: N/A	EFFECTIVE DATE August 2026

SECTION A: GENERAL DESCRIPTION

Under the direction of the California State Controller, and with the oversight of the Chief of Staff and/or the Special Advisor, this position will act as a member of the Senior Executive team and directly support the needs of the Controller's personal office by serving in a confidential capacity in advising and acting as an assistant to the Controller and the Special Advisor. The incumbent, in partnership with the Special Advisor, will assist in strategic decision making, policy development and modification, and evaluating and providing recommendations related to the mission, goals, and objectives of the Controller. This position may be called upon to participate with other executive leaders, business partners, and relevant boards and commissions in support of critical assignments or initiatives related to the needs of the Controller and the interface with constituents, community and business leaders, and elected officials and other dignitaries. The specific duties include but are not limited to the following:

SECTION B: ESSENTIAL FUNCTIONS

(Candidates must have the ability to perform the following essential functions with or without reasonable accommodations.)

Percentage of
Time Spent

Typical Task

30%	- Serve as a confidential advisor in a dynamic work environment, assisting the Special Advisor and Chief of Staff in relieving the Controller of complex administrative responsibilities and duties. Conduct research, analyze, and evaluate recommendations and background information related to meeting requests, invitations, and/or briefing documents. - Schedule all meetings and events internally and externally including associated travel, logistical and necessary security related arrangements, and assist the Special Advisor in
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25% 25%	preparing all briefing documents associated with each calendared item. • Support the Special Advisor in coordinating the briefing process associated with each scheduling request which may include delegating to the appropriate executive leadership team member developing/editing the briefing document(s), creating power point presentation(s), and/or developing/editing associated talking points. • Function as the secondary contact for the State Controller and serve as a liaison along with the Special Advisor between senior executive and executive leadership teams, other dignitaries, administration officials, legislators, business leaders, or the general public. In the absence of the Special Advisor, clarify the Controller's position on various matters, respond to requests, resolve problems, refer inquiries to appropriate responders, and clarify questions concerning policies and procedures. • Engage in and fully coordinate collaborative partnerships and activities designed to improve support and services for the Controller and the Controller's personal office. • Manage the dispositioning of proposals, policies, and documents routed to the Controller for approval or denial. Assist the Special Advisor in managing assignments stemming from Controller-led initiatives that may involve policy-decisions and programmatic research. • Maintain a high-level of availability that may include evening and weekend hours of service as required. Conduct research or inquiries on behalf of the Controller to address concerns or identified problems. • As a member of the Controller's personal office, provide high-level expertise engaging in alternate workstreams to achieve identified outcomes. Identify opportunities to integrate and promote the Controller's Office priorities, initiatives, and programs, which include fiscal oversight and improved government transparency. • Identify best practices to share among business colleagues for better outcomes with assignments and/or initiatives on behalf of the Controller. Initiate a detailed examination of an issue, initiative, or work product to gather evidence that will enable reasonable decisions to be made.
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20%	• When required, function as a member of a team focused on the development of a response, to resolve a complex business issue, or as a member of a special project team to provide expertise and supporting information for decision-making; • Communicate and relate effectively with other government and legislative representatives and their offices and assist in tracking legislative proposals and other business documents. • Maintain current knowledge related to business practices, and the latest technological advances to help support the Controller and Special Advisor. • Demonstrate sensitivity to and understanding of historically disadvantaged individuals, communities, businesses, and groups, and participate in professional development activities to increase cultural competency to enhance diversity, equity-minded practices, and belonging. • Assist the Special Advisor in tracking all delegated assignments in the Controller's personal office to ensure completion. • As needed, travel to assigned locations for meetings, conferences, or business opportunities on behalf of the Controller or Special Advisor.
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SECTION C: NON-ESSENTIAL FUNCTIONS

Percentage of
Time Spent

Non-Essential Functions:

0%	None identified
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SECTION D: ADA REQUIREMENT

(Alternative will be provided for incumbents who are unable to perform the non-essential functions of the job because of a disability as defined by the Americans with Disabilities Act).

SECTION E: KNOWLEDGE, SKILLS AND ABILITIES

- A minimum of two years of advocacy experience at the state level on issues related to the work of the State Controller's Office
- Demonstrated ability to analyze public policy proposals

- Experience and comfort in communicating with high-level legislative and executive branch policymakers and staff;
- Experience in coalition building and working in a team environment;
- Ability to communicate complex information clearly in writing and in oral presentations to a range of audiences;
- Strong organization and interpersonal skills.

SECTION F: RESPONSIBILITY FOR DECISIONS (CONSEQUENCE OF ERROR)

This position will have a significant level of decision-making authority, under the direct oversight of the State Controller/Chief of Staff concerning calendar events. Decisions made will impact the integrity of the State Controller's Office and may have a significantly high impact in terms of consequences of errors.

SECTION G: PERSONAL CONTACT

The incumbent will have personal contact with the various levels of dignitaries within State Government. They will interact with the Chief of Staff and the State Controller. Moreover, the incumbent will be responsible for working with Senior Executive staff members of the Controller's administration, which include Deputy State Controllers, Policy Directors, etc.

SECTION H: WORK ENVIRONMENT

The work environment will consist of standard office equipment within a high-rise facility. It will also require travel to different locations as scheduled to meet with other public official, and/or special dignitaries to represent Controller Cohen.

SECTION I: PHYSICAL REQUIREMENTS

Any lifting, moving, keying, etc. required for this position.

Check the frequency of activity required of the employee to perform the job				
Activity (Hours per day)	Never (0 Hours)	Occasionally (up to 3 hours)	Frequently (3 to 6 hours)	Constantly (6 to 8 hours)
Sitting			√	
Walking		√		
Standing		√		
Bending (neck/waist)		√		
Squatting	√			
Climbing	√			
Kneeling		√		
Crawling	√			
Twisting (neck/waist)		√		

Is repetitive use of hand(s) required?		√		
Simple Grasping (R or L)		√		
Power Grasping (R or L)		√		
Fine Manipulation (R or L)		√		
Pushing/Pulling (R or L)		√		
Reaching (above/below shoulder level)		√		
Lifting/Carrying	Describe the heaviest item required to be lifted or carried, the frequency and the distance: Incumbent may be required to lift up to 25lbs on occasions.			

SECTION J: SIGNATURE

By signing this document, I acknowledge review of the above assigned tasks and fully understand that this duty statement is not an exhaustive list and that I may receive instructions to complete other assignments consistent and within the scope of the classification identified above. I further acknowledge that management, due to operational needs or program constraints, may modify the duties of this position.

Employee's Signature

Date

I have discussed and provided a copy of this duty statement to the employee named above.

Supervisor's Signature

Date