State Treasurer's Office

POSITION DUTY STATEMENT

STO 1000 (Rev 11/2025)

DIVISION OR BCA					POSITION NUMBER (Agency-Unit-Class-Serial)	Position ID
Executive Office					820-101-5393-001	6
UNIT					CLASSIFICATION TITLE	
					Analyst II	
TIME BASE / TENURE	CBID	WWG	COI	MCR	WORKING TITLE	
Full Time/Permanent	R01	2	Yes ☐ No ☒	1		
LOCATION					INCUMBENT	EFFECTIVE DATE
Sacramento						

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.

DIVISION OR BCA OVERVIEW

BRIEFLY DESCRIBE THE DIVISION/UNIT FUNCTIONS

The Executive Office of the STO 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 Office, and Legal Counsel.

GENERAL STATEMENT

BRIEFLY (1 OR 2 sentences) DESCRIBE THE POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS

Under the general direction of the General Counsel, the Analyst II performs a variety of technical, analytical, and administrative tasks relating to the functions of the Legal Office. Duties are of a varied nature involving various 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.
40%	Regularly and independently performs the analysis and drafts an appropriate response on legal issues, including requests for release of records under court order, subpoena, the Public Records Act and the Information Practices Act. Perform research of government codes, regulations, policies, and procedures for the General Counsel regarding matters pertinent to the Treasurer's Office and various boards, commissions, and authorities (BCAs) upon which the Treasurer serves. Responds to sensitive high level inquiries concerning State Treasurer's Office (STO) and the boards, commissions and authorities (BCAs) actions, and coordinates requests to provide analytical support to employees and management of other divisions regarding data and records requests. Maintain a database of all requests submitted to the STO and BCAs.
35%	Conduct research and preparing memoranda and other documents across all types of content for the General Counsel regarding matters pertinent to the Treasurer's Office and the BCAs. Prepare litigation and contingent liability and other reports at the request of the General Counsel. Review work submitted to the General Counsel by the staff and attorneys for consistency with State Treasurer's Office and General Counsel formatting standards. Develop procedure manuals for use in the Legal Office. Maintain a comprehensive workload tracking system and assist in making recommendations. Prepare and update delegations of authority. Track legislation that would affect the STO, BCAs, Public Records Act, Bagley-Keene Open Meeting Act, and additional legislation as requested.
10%	Review all incoming correspondence and advise the General Counsel of critical timeframes. Keep the General Counsel apprised of priority items. Identify and act to resolve coordination or communication problems with requests. Assist in the review, research and analysis of policy, studies, reports and programmatic information under the direction of the General Counsel.
10%	Provide support to the Executive Office Sr. Staff as needed. Analyze, manage and maintain records of filings with the Fair Political Practices Commission, including but not limited to Behested Payment Reports (Form 803) and Payment to Agency Reports (Form 801).
5%	Provide assistance to legal staff on other issues as assigned.

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**
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**