

DUTY STATEMENT

	EFFECTIVE DATE
BRANCH Investments	POSITION NUMBER (Agency – Unit – Class – Serial) 815 - 350 - 7339 - 004
DIVISION/UNIT DCIO/Corporate Governance (Sustainable Investments & Stewardship Strategies – SISS)	CLASS TITLE Investment Officer II, CalSTRS
INCUMBENT NAME Vacant	WORKING TITLE Investment Officer – ESG Stewardship

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 Portfolio Manager, the Investment Officer II provides a high-level of environmental, social and governance (ESG) stewardship and strategic relations expertise for the CalSTRS portfolio. The Investment Officer II is responsible for performing a wide range of complex duties requiring a high degree of independence, confidentiality and discretionary judgment to help achieve the overall strategies and goals of the CG/SISS unit.

% 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.
35%	<p>ESSENTIAL FUNCTIONS</p> <p>Serve as a lead and provide a high-level of ESG stewardship expertise. Working with the Portfolio Managers, help implement the CG/SISS stewardship program, which includes ESG-related engagements and stewardship activities, focusing on environmental issues. Coordinate the activities of internal and external entities and provide expertise on ESG-related corporate engagements, including correspondence, conference calls, in-person meetings, proxy voting and shareholder proposals. Ensure that stewardship efforts align with CalSTRS’ ESG integration policies and the low carbon economy transition workplan across the total fund. Participate in coalitions with other funds or organizations on current ESG issues to support the strategies and goals of CG/SISS. Act as primary support for the CG/SISS led Green Initiative Task Force, including leading team activities and providing analysis and data for reporting. Provide back-up to the Portfolio Manager and Director to represent CalSTRS on advisory bodies, public and investment forums, and political and regulatory forums on investment management issues related to ESG issues. Maintain contact with other international and national organizations such as the PRI, Ceres, CII, INCR, the stock exchanges, the SEC, other institutional investors, etc. concerning ESG issues impacting investments.</p>
30%	<p>Work with the Strategic Relations team and assist in formulating and implementing strategies to inform and educate CalSTRS members, beneficiaries, trustees, stakeholders and other interested parties on CalSTRS’ initiatives and activities around ESG-related engagements and stewardship activities, focusing on environmental issues. Assist in preparing and presenting periodic reports to strategic partners that include CalSTRS’ ESG-related engagements and stewardship efforts.</p>
15%	<p>Support the Stewardship leadership team in planning and executing stewardship activities related to ESG issues, including corporate engagement efforts, collaborative initiatives and financial market outreach.</p>
10%	<p>Represent CalSTRS at a variety of ESG-related activities including, but not limited to, conferences, seminars, manager meetings, and presentations before the Teachers’ Retirement Board.</p>
5%	<p>Act as resource to provide program support and oversight for the CG/SISS Unit. Provide input in the development of the annual CG/SISS business plan that is recommended to senior management.</p>
5%	<p>MARGINAL FUNCTIONS</p> <p>Perform special projects and other activities consistent with supporting the objectives of the Investment Branch and the CG/SISS Unit.</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:

- Decision Making
- Developing Others
- Empowering Others
- Global Perspective
- Influencing Others
- Innovation and Fund Performance Management
- Managing Work
- Market Knowledge
- Organizational Awareness
- Professional Confidence
- Results Orientation
- Risk Management
- Strategic Thinking and Implementation

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
- 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

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