

**CALIFORNIA STATE TREASURER'S OFFICE**

POSITION DUTY STATEMENT

PROPOSED

CURRENT

DIVISION OR BCA CA Alternative Energy & Advanced Transportation Financing Authority (CAEATFA)					POSITION NUMBER (Agency-Unit-Class-Serial) 321-001-4801-002	Position ID 6025
UNIT					CLASSIFICATION TITLE Staff Services Manager II (Sup)	
TIME BASE / TENURE Full Time/Permanent	CBID S01	WWG E	COI Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	MCR 2	WORKING TITLE	
LOCATION Sacramento					INCUMBENT	EFFECTIVE DATE
<b>STATE TREASURER'S OFFICE MISSION</b>						
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.						
<b>COMMITMENT TO DIVERSITY, EQUITY, AND INCLUSION</b>						
The California State Treasurer's Office (STO) is committed to building and fostering a diverse workplace. We believe cultural diversity, backgrounds, experiences, perspectives, and unique identities should be honored, valued, and supported. We believe all staff should be empowered. The STO is proud to foster inclusion and representation at all levels of the Department.						
<b>DIVISION OR BCA OVERVIEW</b>						
BRIEFLY DESCRIBE THE DIVISION/UNIT FUNCTIONS The California Alternative Energy and Advanced Transportation Financing Authority (CAEATFA) works collaboratively with public and private partners to provide innovative and effective financing solutions for California's industries, assisting in reducing the state's greenhouse gas emissions by increasing the development and deployment of renewable energy sources, energy efficiency, and advanced transportation and manufacturing technologies to reduce air pollution, conserve energy, and promote economic development and jobs.						
<b>GENERAL STATEMENT</b>						
BRIEFLY (1 OR 2 sentences) DESCRIBE THE POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS Under the general direction of the Executive Director and the Deputy Executive Director, the Staff Services Manager II (SSM II) is responsible for developing and overseeing the California Hub for Energy Efficiency Financing (CHEEF), marketed as the GoGreen Financing Programs.  The incumbent leads the GoGreen Home and GoGreen Business/Multifamily units working to facilitate the financing of energy efficiency and clean energy improvements for existing residential, business, and multifamily structures through program development, marketing, education, outreach, and compliance.						
<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>					
30%	<b>Personnel Administration:</b> <ul style="list-style-type: none"> <li>Supervises and trains subordinate managers on all aspects of personnel administration, various job duties, and special projects; responds to subordinate managers work-related questions and directs them to resolution; supervises subordinate manager on responses to the more complex questions from the public, management, Executive Office, Board, other state agencies, and stakeholders.</li> <li>Participates in recruitment functions including but not limited to application review; interviews; reference checks, state personnel file review; and personnel documentation.</li> <li>Provides regular feedback to subordinate managers and staff and follows all state processes and procedures regarding employee conduct and discipline.</li> <li>Preparation of probation and annual performance appraisal reports. Coach subordinate managers on their supervisory duties.</li> <li>Sets standards of professionalism regarding personnel management, communications, work products, and program operations.</li> </ul>					
35%	<b>Administrative duties:</b> <ul style="list-style-type: none"> <li>Oversees design and implementation of compliance activity.</li> </ul>					

	<ul style="list-style-type: none"> <li>• Prepares annual budgets and quarterly updates, develops budget change proposals (BCPs) and represents the Authority to the Department of Finance and other budget or legislative staff.</li> <li>• Drafts, negotiates, summarizes, edits, and provides direction to subordinate staff on various legal documents including but not limited to MOAs, contracts, and Interagency agreements with stakeholders, funders including local and state agencies, and vendors. Manages grant application processes for federal funding opportunities available through recent legislation. Coordinates with the State Treasurer’s administration office to secure necessary approvals and establish accounting infrastructure to utilize various sources of funds.</li> <li>• Oversees accounting of administrative expenditures and allocations of expenses to correct funding sources. Oversees reconciliation of credit enhancement and other program funds. Ensures expenses are in line with regulatory guidance and MOAs. Provides guidance to staff on tracking budget to actuals, reviews analysis on expenditures, and makes recommendations for cost savings in line with program direction.</li> <li>• Oversees contracting for external service providers (vendors) and consultants. Guides staff on the development of RFPs and works with the State Treasurer’s administrative office to develop contracting and procurement strategy. Provides guidance on insourcing and outsourcing implementation work; strives to improve work product quality from vendors.</li> </ul>
30%	<p><b>Program Responsibilities:</b></p> <ul style="list-style-type: none"> <li>• Cultivate new programs for expansion and growth. Develop and broach state, federal, and independent contributor funded programs including the Loan Loss Reserve (LLR) and any other financing mechanisms developed to serve the external stakeholders.</li> <li>• Guide the Marketing and Outreach manager to promote program missions, meet targeted objectives, and increase loan participation and engagement.</li> <li>• Responsible for providing support and supervision to subordinate managers and staff on the development, implementation, and ongoing administration of financing programs and compliance including but not limited to the rulemaking process, legislative analyses, ; state regulations process and procedures; staff development trainings; tracking of program applications; metrics for assessing program effectiveness and improving performance; reports to meet legislative requirements and/or requests,</li> <li>• Provides technical, analytical, and training assistance to managers, staff, and program stakeholders; works with the program manager to develop and maintain consistent feedback channels (roundtables, surveys, etc.) for program stakeholders.</li> <li>• Provides guidance and strategy to staff regarding policy decisions, new product or technology introduction, new financing mechanisms and new geographies; overcoming programmatic and operational challenges; responding to market needs and gaps, and balancing stakeholder interests.</li> <li>• Directly supervises the Staff Service Manager I's (SSMIs) on the day-to-day operations of programs and provides support to subordinate managers on all aspects of program management for its programs, board responsibilities, legislation, contract management, regulation, outreach, and compliance requirements.</li> <li>• Oversees the development of regulations and the rulemaking process including materials for the Office of Administrative Law and the CAEATFA board</li> <li>• Serves as the subject matter expert regarding adherence to state, federal, and program requirements, including providing necessary data, reports, and other information to the compliance team for distribution to the IRS, the legislature, independent contributors, and other control agencies to ensure financing program compliance requirements are met.</li> <li>• Supports staff with data collection, data integrity and secure data management. Provides guidance and insights on data analysis. Reviews publication of program data.</li> <li>• Assist staff in identifying IT solutions regarding data and operations. Works with the State Treasurers Office on a procurement plan.</li> <li>• Provides guidance on outreach and education to finance companies, energy retrofit and energy contractors and other potential program and channel partners for both internal staff and contracted vendors</li> <li>• Industry Knowledge: Develops, maintains, and applies a high level of expertise in energy and environmental issues and technologies, residential/small business financing, and public finance matters such as financing techniques and principals, and risk assessment. Monitors and keeps the Executive Director and Deputy Executive Director informed of local, state, and federal legislation affecting CAEATFA and sibling authorities.</li> </ul>
5%	<p>Acts in the absence of the executive team. Other duties as required to further CAEATFA’s mission, vision, values, and goals.</p>

**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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