

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) 321-001-4800-006	Position ID 6028
UNIT					CLASSIFICATION TITLE Staff Services Manager I (Specialist)	
TIME BASE / TENURE Full Time/Permanent	CBID S01	WWG E	COI Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	MCR E	WORKING TITLE GoGreen Business (GGB) SSM I (Spec)	
LOCATION Sacramento					INCUMBENT	EFFECTIVE DATE
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.						
COMMITMENT TO DIVERSITY, EQUITY, AND INCLUSION						
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.						
DIVISION OR BCA OVERVIEW						
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.						
GENERAL STATEMENT						
BRIEFLY (1 OR 2 sentences) DESCRIBE THE POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS Under the general direction of the GoGreen Financing Staff Services Manager II (SSMII), the Staff Services Manager I (Specialist) works collaboratively with the Staff Services Manager I (Supervisory) GoGreen Business/Multifamily (GGB) Program Manager on GGB program design, development, and implementation consistent with the specific goals of the various GoGreen Financing programs.						
% 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>Program Design, Development, and Implementation: Responsible for all aspects of the design, development, and implementation of financing programs and improvements including: conducting complex research and analysis in providing needs assessment; goal setting; audience determination; program design outlining structure, activities, resources, and sustainability; mapping of activities leading to intended outcomes and impacts; stakeholder engagement; analysis of implementation context; resource allocation (funding, personnel, needed legislation, regulatory, rulemaking, information technology); program materials; stakeholder training where appropriate; manuals and guides; monitoring; evaluation of program metrics; and adapting and implementing adjustments based on evaluation findings.</p> <p>Provides recommendations to management on key program issues. Coordinates with technical consultants to resolve complex program implementation issues including financial structures, project and measure eligibility, operations and eligibility review, credit enhancement accounting, data collection and aggregation, engagement with financial entities and building contractors, on-bill repayment and corresponding flow of funds, IT integration, and coordination with vendors.</p>					
20%	<p>Rulemaking: Leads the rulemaking and public input process including drafting of regulations and regulation packages, coordinating stakeholder engagement in the rulemaking process, responding to public comment and coordinating with STO legal counsel, the Attorney General's Office, and Office of Administrative Law reviewing attorneys.</p>					

20%	<p>Marketing, Outreach, and Education: Coordinates with the GoGreen Financing Marketing manager to provide technical assistance to further the availability and effectiveness of GoGreen Financing programs.</p> <p>Work cooperatively with GoGreen Financing management team to build relationships with key stakeholders, including the CEC, CPUC, Investor-Owned Utilities (IOUs), financial entities, retrofit contractors, industry trade groups and associations, state agencies, technical consultants, and vendors.</p> <p>Develops presentations, manuals, slide decks, written communications, and web updates to communicate aspects of the program. Responds to inquiries; provides technical information on GoGreen Financing programs to other technical and policy staff, including those of other state agencies and the Legislature.</p> <p>May travel up to twice a month for one or more days at a time to promote and present GoGreen Financing through networking, attending stakeholder industry events, workshops, seminars, conventions, conferences, symposiums, etc.</p>
10%	<p>Reporting and Contracts: Develops, updates, and maintains program reports, policy memos, as well as written policies and procedures for GoGreen Financing program activities. Prepares and manages contracts and amendments and other various contract-related documentation and reports as needed; makes recommendations concerning contract terms and task order preparation to management; prepares RFPs/RFQs and coordinates all activities associated with consultant selection process; ensures compliance with program regulations, STO policies, and state contracting processes.</p>
5%	<p>Board Responsibilities: Works with program and administrative staff in the preparation of staff reports, resolutions, and any other documentation required to present GoGreen Financing program items to the board. Reviews all agenda packet contents including official minutes, staff reports, staff project summaries, attachments, and resolutions for accuracy and completeness for agenda finalization, and ensures that all staff adhere to various agency schedule posting deadlines.</p> <p>Acts as a lead and provides analytical and technical program support to the CAEATFA board members: the State Treasurer; the State Controller; the Director of Finance, Energy Commission Chair, and Public Utilities Commission (PUC) President (“the Board”) and the State Treasurer’s Office (STO), and works in strategic collaboration with the sibling boards, commissions, and authorities (“BCA’s”) chaired by the Treasurer.</p>
5%	<p>Industry Knowledge: Cultivates, maintains, and applies a high level of expertise regarding GoGreen Financing and related industries including: small business financing; public finance matters such as financing techniques/mechanisms; public rulemaking and regulatory process; California energy efficiency and clean energy policy goals, legislation, and activities; California Public Utilities Commission (CPUC) energy proceedings; energy savings and clean energy methodologies; building energy efficiency and clean energy measures; energy financing entities and financial markets; evaluation of credit enhancement structure, value, and impact; project and quality assurance and quality control standards; utility operations, billing systems, and rebate, incentive and on-bill financing programs; the single family residential, affordable multifamily, and commercial building industries. and risk assessment.</p> <p>Monitors and keeps the CAEATFA Management Team informed of local, state, and federal legislation and/or regulations affecting GoGreen Financing.</p>
5%	Other duties as required in support of CAEATFA's mission, goals, and objectives.

SPECIAL REQUIREMENTS

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.

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SUPERVISOR'S NAME (Print)	SUPERVISOR'S SIGNATURE	DATE
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