

CALIFORNIA STATE TREASURER'S OFFICE

POSITION DUTY STATEMENT

PROPOSED

CURRENT

DIVISION OR BCA ScholarShare Investment Board (SIB)				POSITION NUMBER (Agency-Unit-Class-Serial) 302-001-5157-XXX		Position ID 7515
UNIT				CLASSIFICATION TITLE Staff Services Analyst (SSA)		
TIME BASE / TENURE Full Time/Permanent	CBID R01	WWG 2	COI Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	MCR 1	WORKING TITLE	
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 ScholarShare Investment Board sets investment policies and oversees all activities of ScholarShare 529, the state's 529 college investment plan. The program enables Californians to save for college by putting money in tax-advantaged investments. After-tax contributions allow earnings to grow tax-deferred, and disbursements, when used for tuition and other qualified expenses, are federal and state tax-free.						
GENERAL STATEMENT						
BRIEFLY (1 OR 2 sentences) DESCRIBE THE POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS Under the direct supervision of the Staff Services Manager I, the Staff Services Analyst (SSA) makes recommendations, performs complex duties and analysis for the California Kids Investment and Development Savings Program (CalKIDS or Program), including developing and implementing outreach efforts, managing Program data, preparing reports, and performing other required administrative duties in support of the ScholarShare Investment Board.						
% 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.					
50%	With oversight and direction, perform duties as an outreach coordinator to develop and implement outreach efforts to reach a variety of existing and prospective partners in an effort to aggressively market the Program to California families. Proactively and strategically collaborate with SIB staff, contractors, and external stakeholders, to seek and effectively develop partnership opportunities through a variety of channels and communication avenues, including but not limited to, email, letters, and customer relationship management tools; develop and prepare content for marketing and outreach materials; develop and update the Program's website content; coordinate, organize, present and represent SIB at various on-site and/or virtual meetings and events; plan and draft content for participant communications; provide training and updates for staff and stakeholders on program developments; prepare, facilitate, and conduct educational workshops and online webinars, and disseminate information regarding saving for college. Provide technical and consultative assistance to inquiries that require knowledge of CalKIDS, ScholarShare 529, policies and procedures. Assistance includes telephone calls, written communication and personal meetings. Travel statewide to meet with existing and potential partners and make presentations regarding saving for college and college access. Assist with developing programs to expand outreach efforts targeting under-represented populations aimed at increasing awareness of and participation in CalKIDS and ScholarShare 529.					
25%	Assist with negotiating and developing contracts and purchase orders with public and corporate partners for various marketing and outreach services; assist with preparing request for proposals (RFPs) for a variety of services and assist in vendor selection.					

	Research, develop, make recommendations, and consult with management on appropriate outreach and marketing efforts to encourage participation in college attendance and promoting the message of saving for college and other education-related topics. Consult with existing partnerships regarding inclusion of CalKIDS and ScholarShare 529 messages in information distributed to CA families. Review and analyze marketing and outreach results and prepare analyses, reports and summaries.
20%	Assist with overseeing aspects of Program data collection, transfer and management. Provide technical support regarding data with business partners. Assist with data analysis and preparation of required reports at the direction of the SSMI. With oversight and direction, perform a wide variety of technical, consultative, and analytical administrative support, which may include budget and expenditure planning, budget change proposals, systems development, procurement, and audit support. Develop and implement Board’s policies and procedures. Prepare a variety of detailed Board materials and reports; advise management of potentially sensitive or controversial issues, including remedies and recommendations. Assist with preparing statutorily-mandated reports.
5%	Conduct, perform, and assist with various administrative duties that are necessary for the daily operation and overall support of the Board.

SPECIAL REQUIREMENTS

Valid CA driver’s license, occasional evening and weekend work and travel

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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