

CALIFORNIA STATE TREASURER'S OFFICE

POSITION DUTY STATEMENT

PROPOSED

CURRENT

DIVISION OR BCA CalSavers Retirement Savings Board				POSITION NUMBER (Agency-Unit-Class-Serial) 823-001-5157-XXX		Position ID 7008
UNIT				CLASSIFICATION TITLE Staff Services Analyst		
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 CalSavers was created by legislation passed in 2016 requiring California employers that do not sponsor a retirement plan to participate in CalSavers – an automatic enrollment individual retirement account (IRA) with no employer fees or fiduciary liability. Operating at no taxpayer expense, CalSavers is professionally managed by private sector financial firms with oversight from a public board chaired by the State Treasurer. CalSavers mission is to ensure all Californians have a path to financial security in retirement by providing a simple, portable, low-cost way for workers to invest in their futures.						
GENERAL STATEMENT						
BRIEFLY (1 OR 2 sentences) DESCRIBE THE POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS Reporting to the Director of Strategic Stakeholder Engagement and Customer Experience (SSM II) for the CalSavers Retirement Savings Board (CRSB), this position will serve as an outreach and customer support analyst for the CalSavers Retirement Savings Program (Program). Primary responsibilities include assisting in the implementation and maintenance of the Program's customer support system, and assisting with the Program's outreach and education strategies, plans, communication, collateral and processes for the Program. The analyst works in conjunction with the Program's Outreach Manager(SSM I), as well as other Program staff members as needed.						
% 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.					
45%	Customer Support and Resolution Provide basic support on the development and implementation of the Program's case management system for employer eligibility and participation issues, including those that come directly to the Program from public inquiries as well as more challenging cases sourced from the program administrator's customer service center. Ensure all inquiries and issues are resolved and customers are informed and supported in a professional and effective manner. Ensure the program administrator is informed of case resolution as necessary. Maintain detailed records to document case resolution and report on trends.					
15%	Support Stakeholder Engagement and Partnerships Provide basic support on the implementation of new and existing field marketing, education, and outreach plans to engage employers and employees. Support new and existing strategic partnerships with various employee and employer stakeholder organizations; local governments; asset building, labor, and anti-poverty organizations; and other stakeholders to grow awareness and uptake of programs.					
15%	Tracking, Reporting, and Research Assist in the maintenance of the Program's stakeholder database. Support the implementation of a system to track and report field activity.					

	Provide assistance to the SSM II in identifying new stakeholders and stakeholder organizations, by recommending both organizations and points of contact. And provide assistance in developing specific outreach plans for stakeholder groups consistent with their various unique business models.
15%	Presentations and Communications Support At the direction of the SSM II, serve as a spokesperson for the Program at events and meetings, both online and in-person, including but not limited to coordination with the program administrator field team, or other stakeholders, on delivery of webinars, ad hoc external presentations, and other content. Assist in the development of draft talking points and presentation materials for targeted events and briefings for executive leadership in advance of media and public-facing events. Support the development of targeted promotional materials and disseminate using a variety of distribution channels.
10%	Perform other job-related duties as required. Periodic in-state travel may be required , with possible overnight stays.

SPECIAL REQUIREMENTS

Valid CA driver's license

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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