

**CALIFORNIA STATE TREASURER'S OFFICE**

POSITION DUTY STATEMENT

PROPOSED

CURRENT

DIVISION OR BCA California Debt and Investment Advisory Commission (CDIAC)				POSITION NUMBER (Agency-Unit-Class-Serial) 318-001-5157-007		Position ID 2514
UNIT Education Unit				CLASSIFICATION TITLE Staff Services Analyst		
TIME BASE / TENURE P/FT	CBID R01	WWG 2	COI Yes <input type="checkbox"/> No <input type="checkbox"/>	MCR 1	WORKING TITLE Staff Services Analyst	
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 Debt Advisory Commission was established by statute in 1981. The Commission is the State's clearinghouse for information on public debt issuance. The Commission collects and analyzes information on the issuance of tax-exempt debt and provides technical assistance and analysis of policy issues concerning public debt and investments.						
<b>GENERAL STATEMENT</b>						
BRIEFLY (1 OR 2 sentences) DESCRIBE THE POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS Under the direct supervision of the Staff Services Manager I of the Continuing Education and Outreach Unit, this position performs the following duties						
<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>					
50%	<p>With guidance, assists with education program coordination responsibilities, such as the duties described below:</p> <ol style="list-style-type: none"> <li><b>Event Registration and Attendee Customer Service</b> - Setup, process, audit, reconcile and report on event registrations and registration fees; Maintain registration and payment records and administer payable collections; Serve as primary point of contact for event participants; Send pre- and post-event attendee communications; Take event attendance; Analyze eligibility for continuing education credits and issue certificates.</li> <li><b>In-person Event Logistics</b> - Serve as primary point of contact with vendors to coordinate logistics such as event and luncheon room, food service, internet connectivity, and AV services; Troubleshoot logistic challenges that occur during event; Identify materials needed and ship them to venue; Display CDIAC signage; Distribute event materials; Setup AV equipment; Check attendees in at registration table; Keep management, event speakers, and attendees apprised of logistics; Travel required.</li> <li><b>Webinar Operations</b> - Serve as technical lead for webinar platform before, during, and after event; Troubleshoot technical errors that arise during event; Prepare transcripts.</li> </ol>					

	<ol style="list-style-type: none"><li>4. <b>Contract Development and Administration</b> - Procure facilities, equipment, and services through state contracts or other authorized agreements; Administer contracts to ensure vendor compliance; Conduct meetings with vendors to plan events and evaluate if compliance, suitability, and value were achieved; Conduct site visits and develop database of public and private meeting facilities; Reconcile contract expenditures against contract terms.</li><li>5. <b>Develop and Maintain Event Planning Best Practices</b> – Build and maintain relationships with meeting planning and event coordination organizations and professionals; keep abreast of industry practices; Attend training and career development programs as approved by managers.</li><li>6. <b>Event Material Preparation and Organization</b> - Maintain inventory of education equipment and assets; Collect and maintain event materials and files; Review materials for grammar and readability; Edit formatting, graphics, and videos; Organize event materials in our internal storage system, on our website, and in the Learning Management System.</li><li>7. <b>Speaker Logistics</b> - Schedule meetings with speakers; Take and share notes from planning meetings; Collect and edit speaker biographies and photos; Record and manage contact information and interactions with speakers and industry experts; Advise speakers of best practices when speaking in-person or online.</li><li>8. <b>Logistic Analysis &amp; Procedures</b> - Provide written and verbal reports on program status, planning, and evaluations to keep CDIAC constituents and management informed; Prepare analysis, reports, and make recommendations for improvement and strategic planning; Follow, develop, and maintain procedures.</li><li>9. <b>Maintenance and Reporting for Learning Management System</b> – Review and analyze user data to provide accurate statistical reports to CDIAC management on a regular, reoccurring basis; Correspond with external vendor and internal staff about administrative and technical assistance needs; Maintain user accounts as directed by management.</li></ol>
25%	<p>With guidance, assists with education marketing responsibilities and with outreach activities, such as the duties described below:</p> <ol style="list-style-type: none"><li>1. <b>Marketing</b> - Manage CDIAC’s database of contacts and send emails via the bulk email service; Create and CDIAC’s Social Media communications; Write, edit, and publish marketing materials; Research, identify and implement marketing methods to increase event registrations.</li><li>2. <b>Outreach</b> - Attend industry seminars, conferences and events to professionally represent CDIAC; Act professionally and maintain CDIAC’s reputation; Develop relationships with constituents, industry experts and vendors to increase our network of faculty, event attendees and vendors; Leverage relationships to promote and increase attendance at CDIAC events, research content, and recruit speakers; Monitor and update calendar industry activities and training programs; Travel required.</li><li>3. <b>Marketing and Outreach Analysis &amp; Procedures</b> - Provide written and verbal reports on marketing to keep CDIAC constituents and management informed; Prepare analysis, reports, and make recommendations for improvement and strategic planning; Follow, develop, and maintain procedures.</li></ol>
20%	<p>With guidance, assists with the research and development of educational content and curriculum responsibilities, such as the duties described below:</p>

	<ol style="list-style-type: none"> <li>1. <b>Research Educational Content and Curriculum</b> – Occasionally conduct research for educational content and curriculum development on debt issuance and public fund investment matters; Research, analyze, and report on industry news, reports, trainings, events, or other resources related to potential educational content.</li> <li>2. <b>Outreach to Expert Faculty</b> – Assists with meetings and discussions with industry experts as part research and develop educational content and curriculum; Interacts with public and private sector professionals; Recommend subject-matter experts to management as prospective speakers.</li> <li>3. <b>Identify Seminar Structure and Approach</b> – Assists determining the best approaches to deliver curriculum and other educational information based upon topic, available educational resources, and chances in the modes, technologies and participation; Evaluate alternative methods to provide curriculum and educational information.</li> <li>4. <b>Prepare Agendas and Event Materials</b> – With supervision, develops event agendas and writes descriptions of session content; Coordinates with speakers to develop and review event material to ensure content is aligned with educational goals; Develop supplemental education materials; Develop list of recommended resources for event participants.</li> <li>5. <b>Evaluate Event</b> – Prepare and analyze evaluations to determine the effectiveness of CDIAC’s education programs.</li> <li>6. <b>Education Schedule and Planning</b> - Recommend curriculum schedules to coincide with other industry activities and training programs; Participates in curriculum development.</li> <li>7. <b>Educational Content and Curriculum Development Analysis &amp; Procedures</b> - Provide written and verbal reports on educational content and curriculum development to keep; Prepare analysis, reports, and make recommendations for improvement and strategic planning for management review and approval; Follow, develop, and maintain procedures.</li> </ol>
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5%	Performs other duties as required.
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**SPECIAL REQUIREMENTS**

**Periodic travel is required**

**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

**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