

CALIFORNIA STATE TREASURER'S OFFICE

POSITION DUTY STATEMENT

PROPOSED

CURRENT

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| DIVISION OR BCA CalSavers Retirement Savings Board | | | | POSITION NUMBER (Agency-Unit-Class-Serial) 823-001-4801-002 | | Position ID 7007 |
| UNIT Outreach, Customer Service & User Experience | | | | CLASSIFICATION TITLE Staff Services Manager II | | |
| TIME BASE / TENURE Full Time/Permanent | CBID S01 | WWG E | COI Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> | MCR 2 | WORKING TITLE Deputy Director of Stakeholder Outreach and Customer Experience | |
| 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 | | | | | | |
| Reporting directly to the Executive Director of the CalSavers Retirement Savings Board (CRSB), this position will have primary responsibility for the development, implementation, and maintenance of outreach, education, customer support, marketing and user experience strategies and processes for the CalSavers Retirement Savings Program. The SSM II provides leadership to a staff analyst assigned fully to CalSavers outreach, education and support and serves as a member of the Program's senior staff. This position is responsible for: (1) CalSavers' outreach, education, marketing and customer support efforts to employers, employees, and other stakeholders to encourage participation and program growth; (2) coordination with the field outreach, onboarding, customer support, user experience, and marketing teams of CalSavers' third-party program administrator and all consultants and contractors assisting with implementing the Program; and (3) working with external affairs staff in the State Treasurer's Office on a coordinated strategy to promote the Program across the state using a variety of events and channels. And (4) SSM II guides social media and other marketing initiatives to enhance CalSavers' visibility and engagement, while also proposing, leading, and implementing AI-driven solutions to optimize outreach, marketing, customer service, and overall program efficiency. | | | | | | |
| % 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% | | <p>Strategic Oversight and Direction over Stakeholder Relations, Customer Service, User Experience, and the Program's Educational Programming</p> <p>Review, direct, and perform the higher level, more complex work of the department.</p> <p>Provides oversight, direction and/or training to staff and/or consultants and vendors to ensure:</p> <ul style="list-style-type: none"> the development and dissemination of messages are effective and promote the Program using a variety of field, online, and other channels the development and implementation and refinement of public webinars for employers and savers all inquiries and issues are resolved and customers are informed and supported in a professional and effective manner | | | | |

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| | <ul style="list-style-type: none"> the employer inquiry email inbox is properly staffed and all inquiries are handled promptly and accurately within defined service levels technical determinations are made according to all applicable laws, regulations, and policies proper handling of employer eligibility and participation issues, including those that come directly to the Program from public inquiries as well as challenging cases sourced from the program administrator’s customer service center oversight of any contracted vendors for outreach, field marketing, and education services development and support new and existing outreach, education, and field marketing efforts to engage employers and employees development and support of 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 program oversight for marketing campaigns including traditional advertising, contracted outreach through third-party organizations, and social media campaigns |
| 25% | <p>Represents CalSavers at meetings, conferences, and events on a variety of CalSavers Stakeholder, Customer Service or Outreach matters serving as primary spokesperson and a key subject matter expert. Participates in or personally presents, explains, defines, and educates the audience on these matters. Local, statewide and nationwide travel is required to attend off site meetings, conferences, events and/or training. Review, direct, and perform the higher level, more complex work of the department including working directly with the State Treasurer’s Executive Office staff regarding external affairs matters.</p> <p>Serve as a spokesperson for the Program at events, meetings, and, at the direction of the Executive Director, with the media.</p> |
| 20% | <p>Participates in the organization, planning, policy and procedural decision making of the CalSavers Program. Advises executive leadership of new and changes in Stakeholder Relationships, Customer Service and User Experience among internal and external partners, the Program and the Program Administrator. Identifies program-specific key objectives and strategic initiatives. Leads projects, presentations to leadership and may represent the Executive Director on critical projects and assignments. Ensures performance is consistent with CalSavers goals and objectives. Responsible for guiding the strategic development of marketing and social media initiatives to enhance CalSavers' visibility, engage stakeholders, and drive program participation across digital and traditional platforms. Guides AI-related initiatives to support outreach, customer service, marketing, and operational efficiency, ensuring the program leverages technology to enhance performance and user experience</p> |
| 5% | <p>Other duties as required. Regular in-state and nationwide travel is required, approximately one to four times per month, with some overnight stays.</p> |

SPECIAL REQUIREMENTS

Valid CA driver’s license. Regular in-state and nationwide travel is required, approximately one to four times per month, with some overnight stays.

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.

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| 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.

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| SUPERVISOR’S NAME (Print) | SUPERVISOR’S SIGNATURE | DATE |
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