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| **PART A** | | |
| **Position No: 301-001-5157-XXX** | | **Date:** |
| **Classification:** Staff Services Analyst | | **Name:** |
| Under the direct supervision of the Staff Services Manager I, the Staff Services Analyst (SSA) makes recommendations, performs less complex duties and analysis for the California Kids Investment and Development Savings Program (CalKIDS or Program), including assisting with the management and analysis of Program data, preparation of reports, development and implementation of outreach efforts, and performance of other required administrative duties in support of the ScholarShare Investment Board. | | |
| **Percentage of time performing duties** | **ESSENTIAL FUNCTIONS** | |
| 40% | With oversight and direction, facilitate and assist with overseeing all aspects of Program data collection, transfer and management, and serve as the primary liaison between the Program, stakeholders, vendors, and state agencies. Responsibilities include, but are not limited to, assisting with the collection, review, handling, management, storage, and transfer of large volumes of sensitive program and participant data, all in collaboration with the State Treasurer’s Office (STO) Information Technology (IT) department, uploading data into recordkeeping system; and assisting with technical support regarding data-related items with partner agencies and business partners.  Assist with monitoring and executing data sharing schedules, procedures, and processes, and assist with the compilation and analysis of various program and participation data and preparation of required reports, as directed by the SSMI. Assist with the analysis of available data and financial reports on a weekly, monthly, annual and ad-hoc basis. Provide integral support for all functions and needs related to recordkeeping during the development, launch, and implementation of the Program.  Assist with preparing and presenting on a variety of Board meeting materials and reports; advise management of potentially sensitive or controversial issues, including remedies and recommendations. Assist with pPreparing statutorily-mandated annual reports and communications. | |
| 35% | Assist with a wide variety of technical, consultative, and analytical administrative functions, which may include budget and expenditure planning, budget change proposals, systems development and audit support. Assist with the development and implementation of the Program’s policies and procedures. Assist with tracking of relevant state and federal legislation.  With oversight and direction, serve as a liaison to contractors, stakeholders, State agencies, and relevant departments within the STO as it relates to a variety of areas that may include consulting, data analysis and reporting, procurement, budget, accounting, legislation, legal, information technology, and communications.  Negotiate and develop contracts and purchase orders for various Program-required services; monitor progress and compliance to contracts. Assist with preparing and overseeing request for proposals (RFPs) for various Program-related services and assist in vendor selection.  Research and consult with management on Program-related areas, including but not limited to, regulatory and statutory requirements, compliance, data collection and analysis, reporting, and outreach and marketing strategies.  Assist with preparing complex, technical and consultative analysis of college access amongst targeted populations. Research, prepare, and present recommendations to SIB management on a variety of college and education topics. | |
| 20% | Make recommendations and perform duties to assist outreach efforts to a variety of existing and prospective partners in an effort to aggressively market the Program to California families. With oversight and direction, proactively and strategically collaborate with SIB staff, contractors, and external stakeholders, to seek and effectively develop partnership opportunities through a variety of channels. Assist with composing and preparing content for marketing and outreach materials. Research marketing and outreach opportunities to reach CA families and make recommendations to management; and review and analyze results and prepare reports and summaries.  Assist staff with efforts to expand outreach efforts targeting under-represented populations aimed at increasing awareness of and participation in CalKIDS and ScholarShare 529.  Provide technical and consultative assistance to inquiries that require knowledge of the Program, policies, and procedures. Assistance includes complex inquiries, written communication, and personal meetings. | |
| 5% | Conduct, perform, and assist with various administrative duties that are necessary for the daily operation and overall support of the Board. | |
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| **Percentage of time performing duties** | **NON-ESSENTIAL FUNCTIONS** | |

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| **PHYSICAL AND MENTAL REQUIREMENTS OF ESSENTIAL FUNCTIONS** | | | | | |
| **Activity** | **Not Required** | **Less than 25%** | **25% - 49%** | **50% - 74%** | **75% or more** |
| **Vision** |  |  |  |  |  |
| **Hearing:** |  |  |  |  |  |
| **Speaking:** |  |  |  |  |  |
| **Walking:** . |  |  |  |  |  |
| **Sitting:** |  |  |  |  |  |
| **Standing:** |  |  |  |  |  |
| **Balancing:** |  |  |  |  |  |
| **Concentrating:** |  |  |  |  |  |
| **Comprehension:** |  |  |  |  |  |
| **Working Independently:** |  |  |  |  |  |
| **Lifting up to 10 LBS occasionally:** . |  |  |  |  |  |
| **Lifting up to 20 LBS occasionally and/or 10 LBS frequently:** |  |  |  |  |  |
| **Lifting up 20-50 LBS occasionally and/or 25-50 frequently:** |  |  |  |  |  |
| **Fingering:** |  |  |  |  |  |
| **Reaching**. |  |  |  |  |  |
| **Carrying:** |  |  |  |  |  |
| **Climbing:** |  |  |  |  |  |
| **Bending at waist:** |  |  |  |  |  |
| **Kneeling:** |  |  |  |  |  |
| **Pushing or pulling:** |  |  |  |  |  |
| **Handling:** |  |  |  |  |  |
| **Driving:** |  |  |  |  |  |
| **Operating equipment:** |  |  |  |  |  |
| **Working indoors:** |  |  |  |  |  |
| **Working outdoors:** |  |  |  |  |  |
| **Working in confined space:** |  |  |  |  |  |

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| **PART B**  **PROSPECTIVE EMPLOYEE RESPONSE** | | | |
| **Position No: 302-001-5157-XXX** | | **Date:** | |
| **Classification: Staff Services Analyst** | | **Name:** | |
| Do you have any physical or mental condition or limitation that will prevent you from performing the essential functions of the position as described above? | | | |
|  | No. I have no physical or mental condition or impairment that would prevent or otherwise impair me from performing the essential functions of the job, as set forth in the job description above. | | |
|  | No. I do have a physical or mental condition or limitation that will require reasonable accommodation in order for me to be able to perform one or more of the essential functions of the job, as set forth in the job description above. | | |
|  | Yes. I have a mental or physical condition or limitation that will prevent me from performing one or more of the essential functions of the job, as set forth in the above job description even with reasonable accommodation. | | |
|  | I am not sure if I have any physical or mental condition or impairment that might prevent or otherwise impair me from performing one or more of the essential functions of the job, as set forth in the above job description. | | |
| **Note:** If you have checked this box, please indicate in the space below the following information:  1. the essential function in question, and  2. the specific functional limitations you have that you believe may prevent or otherwise impair you from performing that essential function. | | | |
| You may attach additional pages if necessary. A Personnel Office representative will contact you in order to discuss the matter with you in greater detail. If during this conversation it is determined that a reasonable accommodation may be necessary in order for you to perform the essential function(s) of the job, the representative will discuss that option with you. | | | |
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| **CERTIFICATION:** I certify that I have provided true and complete information concerning my ability to perform the essential functions as it pertains to above job description. (Any misrepresentation or material omission may be cause for dismissal.) | | | |
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| Applicant’s Signature | | | Date Signed |