

Department of Financial Protection and Innovation

Position Duty Statement

DFPI HRO 203 (Rev. 07-2021)

NAME	EFFECTIVE DATE
CLASSIFICATION TITLE Staff Services Manager I (Specialist)	POSITION NUMBER 410-183-4800-100
WORKING TITLE Outreach Specialist	DIVISION/OFFICE/UNIT/SECTION Office of Public Affairs/Targeted Outreach
BARGAINING UNIT S01	GEOGRAPHIC LOCATION San Francisco

General Statement: Under the general direction of the Targeted Outreach Director, Staff Services Manager II, the Staff Services Manager I (Outreach Specialist) represents the Department of Financial Protection and Innovation (DFPI) and promotes the initiatives of the California Financial Protection Law through educational and outreach activities across the state. This position requires excellent writing, communication, and public-speaking skills as well as a high degree of independence, as the incumbent will be expected to be in the field, often working with under-resourced groups such as older adults, military and veterans, immigrant communities, and students.

Fluency in written and spoken English and Spanish is required to be appointed to this position. Bilingual testing will be conducted to certify bilingual Spanish fluency.

Duties include, but are not limited to, the following:

A. Specific Assignments [Essential (E) / Marginal (M) Functions]:

- 40% (E)** The incumbent will plan, organize, coordinate, and participate in education and outreach activities, events, and meetings within an assigned geographic region. This will require traveling to participate in events, presentations, public speaking at events, hosting webinars, and developing materials as promotion. The incumbent will also develop relationships with local community-based organizations and cultivate a robust network of contacts.

- 40% (E)** Works closely with the DFPI’s internal units and the Office of Public Affairs team to assist in the creation, Spanish-language translation, and delivery of communications and print materials to consumers, news media, and other stakeholders. Will perform as the Department’s spokesperson in replying and presenting to Spanish-language news outlets (such as Telemundo, Univision, etc.). Spanish-speaking duties estimated at 20%.

- 10% (E)** Researches, recommends, and implements sensitive departmental policies and procedures related to education and outreach. Documents and advises DFPI leadership on consumer-related issues reported during interactions at events and presentations.

5% (E) Assists in tracking metrics and develops reports for the Office of Public Affairs to document CBO engagement and participation.

5% (M) Performs other related duties as required.

B. Supervision Received

This position reports under the general direction of the Targeted Outreach Director, Staff Services Manager II, however, direction and assignments may also come from the Deputy Commissioner of Communications.

C. Supervision Exercised

None.

D. Administrative Responsibility

None.

E. Personal Contacts (English and Spanish)

- 1) Peers: DFPI staff and leadership
- 2) General public, consumers, businesses, and DFPI Licensees
- 3) Consumer advocates, community leaders, and other governmental agencies
- 4) Business, Consumer Services, and Housing Agency

F. Actions and Consequences

If the duties and responsibilities described for this position is not performed adequately, negative consequences to the DFPI's Targeted Outreach efforts, the Communications Division's goals, and the Department's mission include:

- 1) An uninformed consumer base who are vulnerable to scams, fraud, and unscrupulous business practices.
- 2) An incomplete and limited communication channel to the public, news media, licensees, and registrants.
- 3) Noncompliance with the California Consumer Financial Protection Law.

G. Functional Requirements

This position requires excellent writing, communication, and public-speaking skills as well as a high degree of independence, as the incumbent will be expected to be in the field working with targeted groups, such as senior citizens, military personnel, immigrant communities and students. This position requires the incumbent to fluently read, write, and speak Spanish.

H. Other Information

This position is fully remote, although staff meetings conducted at local DFPI offices may be required on occasions. To successfully complete the duties and responsibilities for this position, travel to different locations may be required. Travel is primarily done by driving, but also

includes periodic air travel, and periodic overnight travel. Punctuality, dependability, professionalism, and resourcefulness are highly desired.

CONFLICT OF INTEREST

This position is subject to Title 10, section 3830 of the California Code of Regulations, the Department of Financial Protection and Innovation’s Conflict of Interest Regulations. The incumbent is required to submit a Statements of Economic Interests (Form 700) within 30 days of assuming office, annually by April 1st and within 30 days of leaving office.

I have read and understand the duties listed above and I can perform these duties with or without reasonable accommodation. (If you believe reasonable accommodation is necessary, discuss your concerns with the hiring supervisor. If unsure of a need for reasonable accommodation, inform the hiring supervisor, who will discuss your concerns with the Health & Safety analyst.)

Employee Signature

Date

Employee’s Printed Name, Classification

I have discussed the duties of this position with and have provided a copy of this duty statement to the employee named above.

Supervisor Signature

Date

Supervisor’s Printed Name, Classification