

**DUTY STATEMENT  
STATE TREASURER'S OFFICE  
CSCRSIB**

<b>PART A</b>	
<b>Position No: 823-001-4801-002</b>	<b>Date:</b>
<b>Class: Staff Services Manager II (Supervisory)</b>	<b>Name: Vacant</b>
<p>Reporting directly to the Executive Director for the California Secure Choice Retirement Savings Investment Board (CSCRSIB), this new position will have the functional title of Director of Outreach and Marketing and primary responsibility for the development, implementation, and maintenance of outreach and marketing strategies, plans, communications, collateral and processes for the CalSavers Retirement Savings Program.</p> <p>The SSM II provides leadership to a SSM I and a staff analyst assigned fully to CalSavers outreach and marketing, collaborates with the Program's part-time senior advisor for outreach and marketing, and serves as a member of the Program's senior staff along with the Deputy Executive Director (SSM II) and Policy Manager (SSM I). This position is responsible for: (1) CalSavers' outreach, marketing, and communication efforts to employers, employees, and other stakeholders to encourage participation and program growth; (2) coordination with the field outreach and marketing teams of CalSavers' third-party program administrator and all consultants and contractors assisting with implementing the Program; and (3) working with communications staff in the State Treasurer's Office on a coordinated strategy to promote the Program across the state using a variety of communications channels.</p>	
<b>Percentage of time performing duties:</b>	<b>ESSENTIAL FUNCTIONS</b>
<b>35%</b>	<p><b>Strategic Leadership, Coordination and Accountability.</b> Refine and enhance the overall strategy to promote the Program to employers, employees, the public, and other stakeholders and drive high levels of participation in the Program. Oversee implementation of all components of the strategy and develop coordinated operational plans for each stream of the strategy. Oversee staff assigned to outreach and marketing; coordinate with consultants, contractors, and other staff of the State Treasurer's Office; and ensure the implementation of the strategy is coordinated across all the individuals and entities participating. Develop regular reporting and metrics on outreach and marketing and coordinate frequently with the Executive Director on progress and adjustments to implementation. Participate in and present to meetings of the Treasurer's executive staff.</p>
<b>30%</b>	<p><b>Stakeholders, Partnerships, and Regional Working Groups</b> Develop and support new and existing marketing, education and outreach efforts to engage employers and employees. Build on existing and develop new 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. Support the Program's primary partner organizations in the development of regional leadership groups, including the identification and recruitment of local influencers, planning, message dissemination, event facilitation, and local media outreach. Participation in regularly scheduled working group meetings with industry stakeholders and promotion of the pilot programs. Mobilize state-level partner resources and develop spokespeople among partner organizations. Oversee staff maintenance of the Program's stakeholder database. Develop and oversee a</p>

	<p>system to track and report field activity. Coordinate with the Program's third-party administrator's field and marketing team to ensure resources are deployed strategically and in conjunction with Program and stakeholder resources. Provide assistance to stakeholders in developing specific outreach plans consistent with their various unique business models.</p>
<b>25%</b>	<p><b>Communications</b>  Work with senior staff, the Treasurer's communications staff, and consultants and contractors to develop and disseminate effective messages to promote the Program using earned and paid media. Develop talking points for targeted events and prepare briefings for executive leadership in advance of media and public-facing events. Develop targeted promotional material and disseminate using a variety of distribution channels. Oversee any contracted vendors for outreach, marketing, and communications services. At the direction of the Executive Director, serve as a spokesperson for the Program at events, meetings, and with the media. Develop spokespeople among partner and stakeholder organizations. Work with the third party administrator to ensure the Program's website incorporates effective language and design elements.</p>
<b>10%</b>	<p>Perform other job-related duties as required. <b>Regular in-state travel is required</b>, approximately one to four times per month, with some overnight stays.</p>

**PHYSICAL AND MENTAL REQUIREMENTS  
OF ESSENTIAL FUNCTIONS**

<b>Position No: 823-001-4801-002</b>		<b>Date:</b>			
<b>Class: Staff Services Manager II (Supervisory)</b>		<b>Name: Vacant</b>			
<b>Activity</b>	<b>Not Required</b>	<b>Less than 25%</b>	<b>25% to 49%</b>	<b>50% to 74%</b>	<b>75% or More</b>
<b>VISION:</b> Review printed and handwritten material, reading computer screen.					X
<b>HEARING:</b> Answer inquiries and provide verbal information to agencies, communities, and public and private sector.					X
<b>SPEAKING:</b> Answer inquiries and provide verbal information to agencies, communities, and public and private sector.				X	
<b>WALKING:</b> Distributing information and copying.				X	
<b>SITTING:</b> Sitting at desk for long periods of time.					X
<b>STANDING:</b> Xeroxing or faxing		X			
<b>BALANCING:</b>	X				
<b>CONCENTRATING:</b> Gathering financial/statistical information, preparing analytical reports and documents.					X
<b>COMPREHENSION:</b> Understanding financial and statistical information gathered from various sources.					X
<b>WORKING INDEPENDENTLY:</b> Must be able to work independently and under the supervision of the Executive Director/SSM II.					X
<b>LIFTING UP TO 10 LBS OCCASIONALLY:</b> Obtain files and documents				X	
<b>LIFTING UP TO 20 LBS OCCASIONALLY AND/OR 10 LBS FREQUENTLY:</b>		X			
<b>LIFTING UP 20-50 LBS OCCASIONALLY AND/OR 25-50 FREQUENTLY:</b>		X			
<b>FINGERING:</b> Use computer to enter data gathered and dial telephone					X
<b>REACHING:</b> Answering telephone and reach for supplies and paperwork.				X	
<b>CARRYING:</b> Carry documents and files.				X	
<b>CLIMBING:</b>	X				
<b>BENDING AT WAIST:</b>	X				
<b>KNEELING:</b>	X				
<b>PUSHING OR PULLING:</b>	X				
<b>HANDLING:</b> Sort and file paperwork				X	
<b>DRIVING:</b>		X			
<b>OPERATING EQUIPMENT:</b> Computer, telephone, xerox machines, fax.					X
<b>WORKING INDOORS:</b> Enclosed office environment					X
<b>WORKING OUTDOORS:</b>		X			
<b>WORKING IN CONFINED SPACE:</b> Enclosed office environment					X