

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

PART A	
Position No: 302-001-5393-004	Date:
Classification: Associate Governmental Program Analyst	Name:
<p>Under the direct supervision of the Staff Services Manager I, the Associate Governmental Program Analyst (AGPA) makes recommendations, performs complex duties and analysis for the California Kids Investment and Development Savings Program (CalKIDS or Program), including 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.</p>	
Percentage of time performing duties	ESSENTIAL FUNCTIONS
40%	<p>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. 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.</p> <p>Monitor and execute data sharing schedules, procedures, and processes. 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.</p> <p>Prepare and present on a variety of Board meeting materials and reports; advise management of potentially sensitive or controversial issues, including remedies and recommendations. Prepare statutorily mandated annual reports and communications.</p>
35%	<p>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.</p> <p>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.</p> <p>Negotiate and develop contracts and purchase orders for various Program-required services; monitor progress and compliance to contracts. Prepare and oversee request</p>

	<p>for proposals (RFPs) for various Program-related services and assist in vendor selection.</p> <p>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.</p> <p>Prepare 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.</p>
20%	<p>Make recommendations and perform duties to assist outreach efforts to a variety of existing and prospective partners to aggressively market the Program to California families. Proactively and strategically collaborate with SIB staff, contractors, and external stakeholders, to seek and effectively develop partnership opportunities through a variety of channels. Compose and prepare 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.</p> <p>Assist staff with efforts to expand outreach efforts targeting under-represented populations aimed at increasing awareness of and participation in CalKIDS and ScholarShare 529.</p> <p>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.</p>
Percentage of time performing duties	NON-ESSENTIAL FUNCTIONS
5%	<p>Conduct, perform, and assist with various administrative duties that are necessary for the daily operation and overall support of the Board</p>

PHYSICAL AND MENTAL REQUIREMENTS OF ESSENTIAL FUNCTIONS

Activity	Not Required	Less than 25%	25% - 49%	50% - 74%	75% or more
Vision Click or tap here to enter text.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Hearing: Click or tap here to enter text.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Speaking: Click or tap here to enter text.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Walking: .	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sitting: Click or tap here to enter text.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Standing: Stand at printer, fax, files and copier to conduct business.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Balancing:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Concentrating: Click or tap here to enter text.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Comprehension: Click or tap here to enter text.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Working Independently: Click or tap here to enter text.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Lifting up to 10 LBS occasionally: .	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lifting up to 20 LBS occasionally and/or 10 LBS frequently:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lifting up 20-50 LBS occasionally and/or 25-50 frequently:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fingering: .	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Reaching: Answering telephone.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Carrying: Click or tap here to enter text.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Climbing:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bending at waist: Click or tap here to enter text.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Kneeling: Filing, pulling out information.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pushing or pulling:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Handling: Click or tap here to enter text.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Driving:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Operating equipment: Click or tap here to enter text.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Working indoors: Enclosed office environment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Working outdoors:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Working in confined space: Enclosed office environment.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**PART B
PROSPECTIVE EMPLOYEE RESPONSE**

Position No: : 302-001-5393-004	Date:
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Classification: Associate Governmental Program Analyst	Name:
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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?

<input type="checkbox"/>	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.
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<input type="checkbox"/>	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.
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<input type="checkbox"/>	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.
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<input type="checkbox"/>	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.
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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.

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.)

Applicant's Signature	Date Signed
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