

**DUTY STATEMENT  
STATE TREASURER'S OFFICE  
CA ABLE ACT BOARD**

<b>PART A</b>	
<b>Position No: 822-001-5157-XXX</b>	<b>Date:</b>
<b>Classification: Staff Services Analyst</b>	<b>Name:</b>
<p>Under the direct supervision of the Staff Services Manager I (SSM I), the Field Representative (SSA) assists with performing less complex analysis of the California ABLE Act Program, its policies and provides technical assistance to the ABLE Act Board. With guidance from the SSMI, the SSA creates and conducts broad outreach and public education campaigns to target the Spanish speaking community. This position is designated bilingual and requires the ability to perform duties in Spanish at least 10% of the time while performing essential job functions.</p>	
<b>Percentage of time performing duties</b>	<b>ESSENTIAL FUNCTIONS</b>
<b>40%</b>	<p>With the guidance of the SSM I, provide outreach and education to the Spanish speaking community. Research, identify, and communicate with disability advocacy and service provider organizations, government agencies/public benefit programs, and promote CalABLE to the community by coordinating and conducting outreach events. Participate in regional information sessions and conferences throughout the state of California. Provide outreach efforts through a variety of channels, including but not limited to, written and electronic communications, online and social media platforms, and in-person and virtual events. Assist the SSM I with coordinating, organizing, and presenting the CalABLE program at meetings and events (in person or virtually); preparing, facilitating, and executing educational workshops and online webinars, and disseminating information regarding CalABLE to the community (particularly towards the disabled Spanish speaking community).</p>
<b>25%</b>	<p>With direction from the SSM I, the SSA will assist the Spanish speaking community by serving as a Field Representative/Navigator between the CalABLE program and stakeholders, including prospective account holders. Support, establish and maintain communication with stakeholders, including the communication of program updates, and respond to requests for information. Research, develop, and consult with management on appropriate outreach and marketing materials to encourage participation in the CalABLE program and promote the message of saving for financial independence. Content for marketing and outreach towards the Spanish speaking community include email campaigns, articles, blogs, and letters. This position ensures all materials meet the ADA requirements.</p>
<b>15%</b>	<p>Assist the SSM I with data research and analysis to develop benchmarks to measure the growth and progress of the CalABLE program and prepare detailed reports and summaries to make recommendations to management.</p>

10%	Maintain documentation of stakeholder visits and communications to provide follow-up on requests for further information about the CalABLE program.
5%	Assist with preparing requests for proposals (RFPs) for consulting and management services and selecting vendors. Help negotiate and develop contracts and service orders with public and corporate partners for various marketing and outreach services.
<b>Percentage of time performing duties</b>	<b>NON-ESSENTIAL FUNCTIONS</b>
5%	Perform other program support as needed. Occasional travel may be required.

## PHYSICAL AND MENTAL REQUIREMENTS OF ESSENTIAL FUNCTIONS

Activity	Not Required	Less than 25%	25% - 49%	50% - 74%	75% or more
<b>Vision:</b> Read reports, documents. View written material and computer screens to gather information.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Hearing:</b> Attend meetings, answer telephones.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Speaking:</b> Communicate with staff, stakeholders, and the public.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Walking:</b> Walk to meeting locations and within the office.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Sitting:</b> Sit at a workstation/desk to access information, answer phones.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Standing:</b> Stand at printer, fax, and copier to conduct business.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Balancing:</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Concentrating:</b> Read, understand, and critically analyze information provided to come to a recommended action or position.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Comprehension:</b> Read, understand, and critically analyze information provided to come to a recommended action or position.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Working Independently:</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Lifting up to 10 LBS occasionally:</b>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Lifting up to 20 LBS occasionally and/or 10 LBS frequently:</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Lifting up 20-50 LBS occasionally and/or 25-50 frequently:</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Fingering:</b> Uses a computer keyboard and mouse to gather information and provide data.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Reaching:</b> Answer phones, use computer.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Carrying:</b> Carries work material, files, laptop	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Climbing:</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Bending at waist:</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Kneeling:</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Pushing or pulling:</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Handling:</b> Handles administrative work.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Driving:</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Operating equipment:</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Working indoors:</b> Enclosed office environment.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Working outdoors:</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Working in confined space:</b> Enclosed office environment.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**PART B  
PROSPECTIVE EMPLOYEE RESPONSE**

<b>Position No: 822-001-5157-XXX</b>	<b>Date:</b>
<b>Classification: Staff Services Analyst</b>	<b>Name:</b>

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.
<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.
<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.
<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.

**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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